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ABSTRACT

This review provides a picture of what is known about adults' participation in education and training, with a particular emphasis on the vocational. Section 1 focuses on definitions and examines what the literature has to say about who counts as an adult learner and what counts as adult education and training. Section 2 reviews the literature on participation and motivation in adult education and highlights findings relative to vocational education and training. Section 3 concentrates on two studies in providing the most recent generalizable information on demographics affecting participation, especially in vocational education and training. Section 4 addresses barriers to participation in education and training. It covers types of barriers, problems while participating, and alleviating barriers to participation. Section 5 focuses on employers' attitudes, policies, and practices on adult education and training. The literature is arranged thematically. Themes include government commissioned surveys on the state of United Kingdom training and comparisons with economic competitors, funding of training, and public sector training provision. (Seven pages of references are appended.) (YLB)

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ATTITUDES AND ACCESS TO ADULT EDUCATION:

A review of the literature with special reference to vocational education and training

Kevin Lowden
Pamela Munn
Carolyn MacDonald

SCRE PROJECT REPORTS

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PREFACE

This literature review forms part of a three year research project on 'Opportunities for Mature Students' funded by the Scottish Education Department (SED). A major part of the research concerns perceptions of various groups, such as adult students, providers of education and training, and employers, of education and training. A review of previous work is part of most research projects. In beginning our own perusal of the literature we became aware that a great diversity of publications existed, located not only in the usual education journals, but in personnel and management training journals which were also relevant. We also became aware that there were few attempts to pull this literature together. We decided to make our work available through our Project Report series simply because of the paucity of similar studies. We are conscious that this is not a polished and deeply reflective document. Rather, it is a working paper which has helped to inform our thinking on various aspects of the research. We hope others engaged in research will find it useful and that it may provide a starting point for a much needed comprehensive and critical review of work in the rapidly expanding field of adult education and training.

Throughout, the emphasis is on research and other literature which concerns adults in *vocational* education and training. The reason for this focus is that other literature reviews of adult learners have tended to look at adults participating in 'liberal' or 'general' education. Such reviews include Horobin, Branscombe and Evetts' review *Mature Students in Higher Education* (1986) and Osborn, Charnley and Withnall's *Review of Existing Research in Adult and Continuing Education, Volume 1* (Revised), *Mature Students* (1984). Although Osborn *et al* (1984) do look at adult education in a wider sense, their review does not have a great deal to say about adult vocational learning and training. Indeed, they state that information on mature students in employer-organised training was unobtainable (pp38-39).

Sources

The review concentrates on UK and North American literature.

The information sources consulted for this review were as follows:

- the ERIC database accessed on-line via DIALOG. The relevance of all apparently applicable 'items' was checked in terms of content in the corresponding abstracting journals,

- the *British Educational Index* searched back to 1982 with apparently applicable references located in its original form and again checked for relevant content,

- the research registers *Current Research in Britain - Social Sciences* (formerly *Research in British Universities, Polytechnics and Colleges*) and *Register of Educational Research in the United Kingdom*. These were searched back to 1982,

- the National Institute of Adult Continuing Education *(NIACE) (England and Wales) Database of Existing Research in Adult Continuing Education.*,

- the Institute of Personnel Management bibliographies,

- MSC/Training Agency publications, reports and Government White Papers,

- other original publications highlighted by colleagues and project contacts.

This review covers publications from 1982. This date was chosen firstly because it was practicable and secondly because we wished to draw together relatively recent work that might not have appeared in other reviews. However, where the literature for a specific subsection was sparse, we refer to literature which is earlier than 1982. Classic texts or 'milestone' pieces of research are also included where these are useful in adding to the understanding or context of current research.

It is worth noting that the search of the North American ERIC database revealed *no* literature or research findings, other than pre-1970s, specific to the UK which concerned adult vocational education. However, it did reveal interesting US studies on the same subject which have some comparative value. The search of the research registers produced little relevant material. This again underlines the scarcity of easily accessible past research on adult vocational learning and training within the UK.

As the review proceeded, we found evidence that a substantial amount of vocationally orientated research existed but was unavailable to the general research community. This research was often Government commissioned, policy-orientated work which is either confidential or, more usually, its publication is not seen as a necessity or priority. Those commissioning such work usually intend it to inform policy formulation and, therefore, might not consider publication for a wider audience.

However, there are signs that more recent research on vocational education and training, commissioned by government, is now beginning to be better publicised and is becoming more accessible. For example, annual reports on research commissioned by the Training Agency are now being made available to interested parties.

In summary, then, this review provides a picture of what is known about adults' participation in education and training, with a particular emphasis on the vocational. However,

there are conceptual difficulties in distinguishing between vocational and non-vocational education and in differentiating education from training. Similar problems also arise when trying to define what is meant by an 'adult learner'. It is to this problem of definitions that we first turn.

We are grateful to the Scottish Education Department and to our project advisory committee for their support. The views expressed here are those of the authors, not necessarily those of either the Scottish Education Department or the Scottish Council for Research in Education. We are also grateful to Janette Finlay who typed successive drafts of the manuscript so quickly and competently. We owe a special thanks to Lindsay Mitchell for her advice on the availability of certain literature.

ACRONYMS USED IN THIS REVIEW

ACACE	Advisory Council for Adult and Continuing Education
BACIE	British Association for Commercial and Industrial Education
CBI	Confederation of British Industry
DES	Department of Education and Science
EEC	European Economic Council
IPM	Institute of Personnel Management
ITB	Industrial Training Board
MSC	Manpower Services Commission
NEDO	National Economic Development Organisation
NIAE	National Institute for Adult Education (now National Institute for Adult Continuing Education (NIACE))
OECD	Organisation for Economic Co-operation and Development
PEL	Paid Educational Leave
PICKUP	Professional, Industrial and Commercial Updating
SIACE	Scottish Institute of Adult and Continuing Education
TA	Training Agency
TOPs	Training Opportunities Programme
UMIST	University of Manchester Institute of Technology.
VET	Vocational Education and Training
WEA	Workers Educational Association
YTS	Youth Training Scheme

DEFINITIONS

Adult learners

This section examines what the literature has to say about who counts as an adult learner, and what counts as adult education and training.

Firstly, who counts as an adult learner? Providers of education and training and government agencies tend to define adults in terms of age. MacDonald (1983) observed:

> Twenty-three is the minimum standard age accepted by educational institutions as characterising a candidate for admission by mature entry schemes.

This definition was often used by public sector educational institutions in Scotland in their prospectuses until very recently, when the Scottish Council on Admissions reduced the age to 21. For grant purposes the SED recognises a mature student as being 25 years old or as having been self-supporting for three years. Access courses to higher education may not always set a minimum age but might admit people who are 18 years old and over.

Researchers, on the other hand, have tended to use more elaborate definitions. These usually specify age and a break from initial full-time education. The age and length of break vary. For example, Osborn *et al* (1984) defined a mature student as:

> any student over the age of twenty-one years, who had completed his or her initial stage of formal education and who returned after a gap of a least three years to an extended programme of structured learning.

In contrast, Horobin, Branscombe and Evetts (1987), defined a mature student in the following way:

> The main criterion used in this review is that the mature student has taken a break of more than one year from the end of continuous schooling. The student will usually be 21 years or older but we have not excluded work on those who were 19 or 20 years old if it seemed relevant.

They also made the point that different institutions within the higher education sector have different definitions of what a mature student is, but they did not elaborate further on these differences.

A report by the Advisory Council for Adult and Continuing Education (ACACE) issued in 1981 approved of the Venables Committee's definition of adult and continuing education as:

> ...education for adults which is normally resumed after a break or interruption often involving a period in employment.

Another ACACE report which appeared a year later (1982) employed a slightly different definition. They chose to use:

> ...the broad definition of 'continuing education' as embracing all education and training undertaken after leaving full-time initial education (ie schooling followed immediately by entry to further or higher education).

ACACE (1982) stated that their survey appeared to be the first undertaken in Britain to use such a broad definition; previous British studies had restricted themselves to adult learners in particular places. The same report also mentioned that their definition of adult learning and learners is similar to the broad approach taken by Johnstone and Rivera (1965) in their wide-ranging US survey.

During our review, we found that in most articles, research papers and similar work, definitions of mature students or adult learners were rarely discussed. When they were, there was little consensus among authors as to the exact definition of an adult learner. Rather, there was an arbitrary view or one specific to the research or institution using it. Among these diverse definitions, there was usually one common element. This was that the adult learner was a person who took up a form of learning after a break following their initial education. This break could be as little as one year, as long as three years or, indeed, be unspecified.

Adult vocational education and training

What counts as adult vocational education and training? Is it distinct from adult education in general and, if so, how? The debate on what counts as vocational education and training has flourished since the early 1980s. Most of this literature has focused on the training of the 16+ age group but, increasingly, adult training has become a topic of interest and debate.

Definitions of adult vocational education and training are, like definitions of an adult learner, scarce in the literature. The definitions offered range from the highly general, such as 'any kind of education for people who are old enough to work, vote, fight and marry and who have completed the cycle of continuous education commenced in childhood' (National Institute of Adult Education (NIAE) (1970), to the very specific, such as that of Rogers (1986). He saw training as learning that consists of planned episodes with narrow goals and which is usually tied to the notion of the right way to do something. This usually relates to learning skills where the choice of how to execute the skill is limited.

The MSC survey report *Adult Training in Britain* (1985) defined adult training as:

> almost all training of employees aged 18 and over, except routine familiarisation or induction training given on first joining the company.

The MSC survey's definition included learning done:

> off-the-job and on-the-job, formal and informal courses, distance learning, 'sitting by Nellie' and any training initiated and paid for by employees, provided it was broadly relevant to work and career development.

In a recent government statistical bulletin (SED, 1987), vocational courses were defined as those that lead:

> to external qualifications such as the Scottish Certificate of Education or whose purpose is to train students for a particular employment or to increase their knowledge, skill or proficiency in a particular employment.

Smith (1983) explained that there was a problem in attempting to provide a general definition of training. This was primarily due to the complex nature of the purposes of training. The rationale for adult training was often seen by employers as being the contribution it can make towards increasing the efficiency of their workforce. Smith pointed out, however, that training was just one of a number of ways of achieving this end: improved selection, improved equipment and even poaching of competitors' more able staff all increase the workforce's efficiency. The government's rationale for training may be different from those of employers. Political and social objectives can underly the introduction of training programmes. For example, in times of high unemployment a new training policy may seem appropriate not just to re-skill the labour force but also to portray the government as taking action. Smith (1983) developed definitions for the various types of training rather than attempting to develop an overall definition of training. These were:

induction training	-	providing essential information and procedures for new employees;
booster training	-	used when the level of operative performance has fallen below a certain level. This training aims to improve the quality or quantity of output;
versatility training	-	learning to do more than one job. This is especially relevant to small firms who employ few employees;
on-the-job training	-	acquiring skills by observing the relevant task being performed in the workplace;
vestibule training	-	when instruction takes place in a specific area such as a special area of the workplace.

Smith (1983) mentioned other forms of training but did not elaborate further on their definitions, possibly assuming that they were self-explanatory, these were:

> operative training; supervisory training; clerical and commercial training; management training; technician training; instructor training; retraining; and pre-retirement training.

Some writers have challenged the whole notion of differentiating education and training. Wallace (1985) argued that the school of thought which identified something called 'pure education' distilled from wider education was based on false assumptions. The pure education perspective held that there were certain experiences and knowledge which every developing human should have. These were not related to the individual's environment or society but to abstract ideals. Wallace stated that such a 'curriculum' was impossible and that education had always combined eternal values and cultural objectives with the need to respond to the social, economic and industrial demands of the age. Education then, had always embraced vocational elements and aims.

Hood (1983), on the subject of adult education and training, stated that in the context of preparing for employment:

> ...it is a waste of time to attempt to distinguish between education and training.

He appeared to be acknowledging that since learning covers a wide spectrum of subjects and levels it could and does contribute to the work-related skills of the learners. However, in an apparent contradiction, he did attempt to distinguish more clearly between what he saw as training and as education. He stated that training describes the vocational preparation of a person wherever it is carried out. Education he saw as the accumulation of 'aesthetic, liberal knowledge'. He appeared, then, to suggest a distinction between education and training.

It is evident, therefore, that specific definitions of training, vocational education and adult education, like definitions of an adult learner, are not plentiful and that when they do occur there is little consensus as to what they should encapsulate. This is further compounded by the more fundamental debate on whether there is a difference between vocational education and general education.

Comment

We have seen that those definitions which do arise in the literature usually state that adult learners are people who take up a form of structured learning after a break following their initial full-time education. There is little consensus on how long this break should be, or on the age a person has to reach before he/she is seen as a mature student.

Research projects often define in more detail adult subgroups within the mature student population, based, for example, on their motivations or demographic attributes. In the majority of cases, however, the research does not begin with a statement of who is to count as a mature student. It seems as if, in much of the literature, researchers either adhere to an assumed general

definition which is not made explicit, or take as given the definition of a mature student held by the institution or educational sector in which the research is set.

There is a similar lack of consensus when it comes to definitions of training and vocational education, with the terms acquiring specific meaning only within the situation in which they are used. The majority of such studies do not appear to introduce their work by describing the education or training context in which they are set. Context-specific definitions are useful in understanding certain training programmes but they present difficulties when we attempt to compare across training programmes, especially if they are set in different contexts.

At the other end of the scale, when definitions are given in overviews there is no consensus on what counts as vocational education and training. This lack of consensus seems to stem from the differing theoretical and ideological bases of these studies and indicates the absence of any centralised or 'universal' view of training. Definitions of education and training also vary from society to society (UNESCO, 1975), illustrating the wider contextual forces that shape perceptions of education and its uses. Another likely reason for the lack of consensus on definitions is the diversity of institutions and official bodies involved in education. Each of these has its own definitions which result from historical and administrative differences.

Definitions, especially in the case of the distinctive nature of vocational education, are bound so closely to theoretical and ideological viewpoints that it is perhaps unrealistic to expect a consensus. Ideological and philosophical debates are rarely resolved. It is worth stressing that the division of education into vocational and general/aesthetic forms is problematic. It is problematic because educational knowledge and skills can affect all areas of an adult's life. General knowledge may add to a person's vocational skills and the converse is also true. Moreover, it appears idealistic to believe that we can separate out those experiences and knowledge that are 'purely educational' from those which are 'purely vocational'. They both interrelate and overlap in reality. This view may be of little use to policy makers faced with the development of targeted educational programmes and the current tendency for funding to be provided for that which is seen as vocational. However, it could be argued that policy makers should be aware of the debate on education and the value of more general education in providing a basis for specific employment-related skills (training).

The diversity of definitions has a major consequence for research in that it impairs our ability to compare studies and to generalise from the work done. We can, however, attempt to summarise the definitions which do exist by identifying the common components. In this way, we arrive at three common themes. Firstly, we obtain a view of training as learning which allows a person to acquire, increase or update practical skills that relate to specific areas of employment. Secondly, it appears that studies of training usually exclude induction training from this broad definition. And lastly, vocational education is sometimes differentiated from training in that it is seen as the acquisition of more fundamental and transferable skills that relate to long-term development in the labour market. By drawing out these themes, we do not obtain definitions of

vocational education and training. Rather, we get a representation of the majority viewpoint of what generally constitutes vocational education and training. This is different from a consensus.

In compiling this review and deciding what studies to include we have attempted to avoid the problem of a lack of consensus on the definitions of vocational education and training (and indeed adult education). We chose to include those studies and articles which claimed to look at adult learning and adult vocational education and training according to their own definitions. Our keywords used to search for literature were therefore broad-based. For example, in the case of adult vocational education, such keywords included, vocational education, training, in-company training, job training, vocational training, trade and industrial education. More keywords were combined with the term 'adult' to identify sources of literature that were of potential use to us.

2

WHY DO ADULTS PARTICIPATE IN EDUCATION AND TRAINING?

This section reviews the literature on participation in adult education and highlights findings relating to vocational education and training. Summaries of applicable motivational research given in previous literature reviews (including Horobin *et al* (1987) and Osborn *et al* (1984)) are included, and Courtney's (1981) analysis of such literature has been used as a guide to the major research in this field. To this we have added other work on participation.

This material has been arranged in three subsections which focus on motivation for participation in adult education in general; motivation for 'staying the course'; and, finally, motivation for participating specifically in adult vocational education and training.

Motivation for participating in adult education

As Courtney (1981) observed, the field of participation in adult education would appear to be the most researched area of adult learning, with the greater part of this work being done in the USA. Brookfield (1986) echoed this by saying that the number of journal articles, dissertations and studies devoted to participation in adult education is an indication that it is the most enduring research concern since studies in the field of adult education began. The major summaries of participation literature are Cross (1981), Darkenwald and Merriam (1982) and Long (1983).

The major national studies of participation in adult education are those of Johnstone and Rivera (1965); the National Institute of Adult Education (NIAE) (now the National Institute of Adult Continuing Education (NIACE)) (1970); Aslanian and Bricknell (1980); the Advisory Council for Adult and Continuing Education (1982); Employment and Immigration Canada (1983); and Munn and MacDonald (1988).

To simplify, US and UK motivational research on participation in adult education and training has adopted two approaches. One has been to undertake large generalised surveys from which demographic and societal factors influencing participation have been identified. This approach has contributed to awareness of factors beyond the educational area which affect participation. Such factors range from socio-economic status or class (including its constituent elements), gender and age, to the availability of provision in certain localities. These factors will be discussed further in Chapter 4. While this approach has provided much descriptive information on factors affecting motivation and has produced typologies of adult learners, it has little to say on why adults participate in the way they do (for example, why they choose certain courses or subjects).

The second major approach has focused on the socio-psychological processes which shape motivation in adults. This approach varies in the level at which motivation is studied. The focus

may be on an adult's self-defined goals or it may be on how a person's motivation is affected by interaction with others in his or her social group. Or, taking a wider context, this approach can look at how motivation is affected by perception of societal values, 'structures' and organisations. The socio-psychological approach aims to explain why and how adults participate, and to illustrate what the initial 'sparks' are that create motivational drives. The study of life changes (for instance, becoming unemployed) viewed in relation to the social context of that individual helps us to understand how he/she forms motives and acts to adapt to this change. Education or training is one strategy used to react to life changes. Most of the work using this approach has been carried out in the USA. The socio-psychological approach uses a wide variety of research methods. These may range from banks of attitudinal questions in surveys, to qualitative case-study work.

There is, of course, some degree of overlap between the two approaches. The understanding of the socio-psychological processes of motivation may be aided by an awareness of the demographic characteristics of adult learners. Integrating both approaches would appear, therefore, to provide a more holistic and authentic understanding of participation.

A common thread running through both approaches to studying adult participation in education and training is the 'production' of typologies of adult learners. An adult who reports a wish to do a vocational course to improve his/her employment prospects could be seen as vocationally motivated and categorised with others similarly motivated. These typologies are then subjected to continual tests in order to refine and isolate the main or prime motive responsible for an adult's participation. With the exception of some of the socio-psychological motivation research done mainly in the US, the factors and reasons underlying adults' motives and behaviour have not been examined.

It is also worth noting that there are a number of other ways in which the focus of UK motivational research differs from that of the US. UK research has a history of concentrating on higher and 'general' education. The little generalisable work done on training consists mainly of business and industry studies rather than research undertaken in social and educational fields. This now appears to be changing as a result of the recent emphasis on vocationalism. In addition, the emergence of open learning, modular courses and other initiatives has generated research, albeit rather slowly. Much UK work focuses on the demographic factors involved in motivation. There also exists a sort of sub-strand to this research approach. This consists of particular studies, small surveys or case-studies which look at groups or specific educational or training settings. These are useful in their illumination of specific contexts. Case-studies, obviously, are limited in their generalisability but add depth and understanding to descriptive work.

We now look at some of the findings of this research. We begin with one of the most prolific areas, that of typologies of adult learners.

Typologies of adult learners

Pioneering research on participation in adult education was undertaken in Britain by Hoy (1933). This set in motion the search for typologies to describe the motivation of adult learners. From his research on adults attending evening courses in Birmingham, Hoy found that, although the respondents' reasons for attending were varied, they fell into six broad categories. Of these six, three categories predominated: 'desire for knowledge', 'to obtain qualifications for career reasons' and 'interest in study or interest in a particular subject'.

The research that followed Hoy's (1933) work, attempted to develop a hierarchy of motives and to assess the effects of these on an individual's eventual behaviour. Williams and Heath (1936) stated that learners might participate for more than one motive but that there was usually a dominance of one motive over the others. In this study it was found that the motivation of the majority of learners was a wish to develop and enrich their personalities. A smaller proportion took courses because they wished to contribute to the community. Williams and Heath (1936) also mentioned that 'some actually make use of what they learn for vocational ends'. However, Courtney (1981) cast some doubt on how representative the groups of students studied by Williams and Heath (1936) were, because there was a very low response rate (29%) in one of their sample groups.

The research done by Blumler (1962) largely confirmed the concepts and categories used by Williams and Heath (1936). He looked at students in Ruskin College, Oxford and experienced no adverse response rate effects. Blumler's research took into account the impact that the educational institution had on adults, across a range of areas (social, psychological, political, educational and occupational). This sparked off an interest in this approach but this was shortlived and subsequent researchers largely returned to a narrower focus. While Blumler's (1962) methodology and conceptual framework have been praised, it is questionable whether we can generalise his findings to all adult learners in the 1950s (the period in which the research was carried out). This is due to the atypical nature of Ruskin College with its predominantly working class adult student population. Perhaps Blumler's (1962) research should be seen as a study of those adults who attended Ruskin College in the 1950s.

Cyril Houle (1961) contributed to knowledge about motivation in adult education by introducing a typology which classified participants into three independent categories: goal-orientated (which includes vocational motivation), activity-orientated and learning-orientated participants. Those adults who were primarily goal-orientated, participated to acquire the knowledge needed to fulfil a certain goal. Goals might be vocational or non-vocational. Activity-orientated adults, Houle (1961) explained, participated, not because they were interested in the specific content or aims of the course but in order to enter into a new social world as an escape from difficult domestic situations or social isolation. Those adults who were learning-orientated participated because of a continual desire for knowledge. As a result their participation was usually constant rather than sporadic.

Houle's (1961) work stated that the vocational motive, one aspect of the goal-orientated category, featured strongly but it was rarely mentioned by itself. His work reaffirmed that there are a number of motivational forces involved in an adult's decision to participate but that one predominant motive shapes the decision to select a certain course and subject.

Houle's (1961) findings set off a wave of interest in studying participation in adult education. Notable among such subsequent research was that of Sheffield (1962), Burgess (1971a, 1971b) and Boshier (1971). These researchers concentrated on attempting to refine Houle's (1961) classification of participants in adult education by using factor analysis to 'test' the categories and derive sub-divisions. Their findings add depth to the original Houle typologies (1961), in that the prime motives for participation were further refined. In 1976, Boshier reviewed the previous fifteen years of participation research which had used the scales developed by himself, Burgess and Sheffield. He concluded that the original Houle typology, although based on a small sample size, had still neither been refuted nor completely accepted. However, he still saw the typology as a useful basis for the classification of the main motivational orientations of adults who participate in education.

Research into motivation in the United States, like the majority of studies in the UK, produced typologies of adult learners and ordered them according to the most commonly reported reasons for participation. The large Johnstone and Rivera survey (1965) included an examination of the reasons for participation and produced findings which stated that:

> Over and above the desire to become better informed... vocational goals most frequently direct adults into continuing education, and on the basis of the relative frequency of response of the two job- connected items included in the list, it appears that slightly more adults take courses for job preparation than for job advancement.

The motivation to become better informed (the desire for knowledge) received the most responses for a single category, though by only 1%, but, as Johnstone and Rivera (1965) explain, the total aggregated response in the vocationally-related categories far outweighs this motivational factor. It is interesting to note that in Courtney's (1981) analysis of the Johnstone and Rivera (1965) work, he does not point out the very small percentage difference (1%) between the 'desire for knowledge' category and the individual vocational categories. On the basis of this 1% difference, Courtney (1981) stated that the 'desire for knowledge' is the most important motivating force. Most researchers would wish for a much larger percentage difference before claiming the dominance of one category. Courtney (1981) also appeared to misinterpret the Johnstone and Rivera (1965) data on participation in that he ignored or overlooked the authors' point about combining the vocationally related categories when analysing the reasons for participation. Even allowing for multiple responses, it would appear that vocational reasons outweigh the other categories in the Johnstone and Rivera (1965) study. It would seem, therefore, that we should

treat with caution Courtney's (1981) argument that the literature on motivation and participation research in the field of adult education gives 'the desire for knowledge' as the predominant motivation for participation, with the vocational motivation being ranked as second. There appears to be a difference between the findings of United States and UK large-scale surveys as to which is the most important motive for participation. Studies in the United States more often give the vocational motive as the most important. UK studies typically stress 'desire for knowledge'. It is often difficult to know what the category 'desire for knowledge' means. Responses in such a category can be ambiguous in that they may overlap with those in other categories - for instance, the desire for knowledge could subsume vocational gains. We often depend on qualitative work to shed more light on the adult's primary motive.

However, even in US work, the vocational motive is not always predominant. A study by Young (1980), which attempted to determine motivational factors and conditions, found that the most important reason for participating in adult education and training given by both sexes was interest in the subject. The second most important reason for participating revealed gender differences. Males more commonly stated that participation was linked to current jobs or intended employment, or to spare-time pursuits. Women, on the other hand, were more likely to state that meeting new people and becoming generally better informed were the factors which led them to participate. It is interesting to note that both US and UK research findings tend to reveal similar gender differences.

Factors important to initiating motivation

Research on factors which spark off an adult's interest in returning to education and training, originated largely in the USA. This grew out of socio-psychological work. Verner and Newbury (1958) looked at past research and developed the view that participation in adult education should be analysed in a wider societal context. They believed that such participation was related to an adult's participation in other social relationships and that it was one of the processes by which some adults strive to achieve personal goals (whether vocational, aesthetic or otherwise). It was usually a response to alienation. Verner and Newbury (1958) argued that the way adults perceive and interpret their roles, their self image, the constraints they experience and the way in which they act in the light of these, were essential to the understanding of participation. They suggested that although variables such as sex and age were important in determining participation, social factors were more important. They seemed to be saying that an adult's interaction with wider society, and his/her perception of this, creates the initial motivation to participate. Social characteristics may facilitate or limit participation but these do not explain the origin or intensity of motives. Verner and Newbury (1958) saw the important social characteristics that impinge on motivation, and thus participation in other social structures and events, as social class/occupational status, income and past educational experience.

Anderson and Darkenwald (1979) undertook a large survey to examine participation in the United States. Their survey used complex statistical procedures to analyse the relationships between variables. Whilst finding associations between some of these variables they noted that despite a large representative sample, 90% of the factors that lead adults to participate in, persist in, or drop out from continuing education and training were not identifiable statistically. Anderson and Darkenwald (1979) went on to stress the need for research to take into account personal and situational factors affecting participation, such as changes in employment status or marital changes. The conclusion in the Anderson and Darkenwald (1979) research was that most previous motivational research on participation in adult education had produced information on *who* participate, persist and drop out but not *why* they do so. They, therefore, called for more research to contribute to the development and testing of explanatory frameworks.

The work on developing typologies of adult learners has, to some extent, identified the needs of adults which might be satisfied by participation in adult education. But fundamental questions still remain about the processes which lead to these needs being translated into participation. What creates the need? What makes an adult identify adult education as a means of satisfying this need?

Bergevin and McKinley (1965) argued that the creation of certain motivational drives depends on an adult becoming dissatisfied enough with his or her present performance or circumstances to want to change. If the adult identifies education or training as a means of achieving this change, then he/she will become motivated to participate. Whether the adult actually participates depends on how strongly education is identified as being able to effect a change, and on his/her wider circumstances. Similarly, Tough (1971) found that an adult's wish for a change in his/her life figured highly in motivating participation. It is interesting, however, that neither Tough (1971) nor Bergerin and McKinley (1965) attempted to explain why some adults, and not others, see education as being able to effect such a change.

Osborn, Charnley and Withnall (1982) summarised this 'life-changes' approach by viewing participation in a learning activity not as a single act but as the result of a chain of responses, each based on an evaluation of the position of the individual in his/her environment. Cross (1981) added to this by outlining such a process. The adult possesses certain attitudes about education and training, its role, how enjoyable an activity it appears and perceptions of how useful it is. When life changes and transitions occur, the adult may re-evaluate his or her life (to a greater or lesser extent) and perceive new needs and goals in order to adapt to such change. New skills or knowledge may be considered as a way of reaching these new goals. Given the adult's attitudes to education and training, their orientation and strength, and the presence of opportunities and barriers, the adult may feel that education and training can meet their new goals and go on to participate.

Rubenson (1978) reviewed work done on participation. He stated that research should consider participation in adult education in the context of the 'total living situation of the

individual'. Based on this he proposed a theory of 'expectancy-valence' to describe the strength of an adult's motivation to participate in and complete a programme of learning. This theory stated that inherited properties, environmental factors, previous experience, the current needs of the individual and the individual's experience of these needs all result in adults' perceptions and interpretations of the environment. This perception gives individuals a certain expectation or view of education (ie whether it will be able to fulfil their needs and whether they can participate in and successfully complete the education or training). Attached to this expectation, is a perceived value (valence) of the educational activity in terms of meeting needs. Correspondingly, if an educational activity fails to meet the adult's expectations, then his or her participation will decline. Rubenson's (1978) work is important in that it reveals more about the processes that form motivational drives and maintain them. Furthermore, his work illustrates that motivation to participate in adult education is inextricably bound to the adult's whole life experience. The study of motivation from this holistic perspective is endorsed by Courtney (1981). He stated that there is a need to concentrate on individuals' expressions of their internal logic of motivation '... the way Houle appeared to be going with his emphasis on the individual's perceptions of the totality of his/her educational experiences'.

Courtney (1981) observed a number of shortfalls in much of the work on typologies. Firstly, apart from some US work, participation research suffers from being concerned primarily with studying motivation within the confines of the educational 'world'. Courtney (1981) believed research should look at reasons for participation in the context of how adults participate in other social activities. Here, he appeared to be agreeing with the views of Verner and Newbury (1958). He also argued that participation should not be viewed as a single unit of analysis or demographic variable existing independently of other factors. Courtney (1981) appeared to be saying that these factors shape both the adult's participation behaviour (as well as other social behaviour) and his/her responses to their situation and circumstances.

Secondly, Courtney (1981) suggested caution when participation scales, derived from psychometric methods, are analysed using complex statistical procedures. Such procedures can:

> confuse two strands in the analysis of participation: how much is the act of entry a function of response to immediate circumstances, ... and how much is it a function of abiding values which favour educational endeavour.

He observed, as did Anderson and Darkenwald (1979), that there is a lack of interpretive studies which attempt to uncover the reasons for certain motivational drives.

Thirdly, Courtney (1981) noted that, in comparison with the UK, most research on participation in adult education comes from North America. He explained this as arising from the 'hidden agenda' which underlies such US research. Participation in adult education in the US means, in many cases, the survival of educational programmes. Therefore, the financial viability of centres running such courses is linked directly to participation. This, in turn, produces the

impetus for research that may contribute to an understanding of the factors involved in participation. The overall aim would appear to be the accumulation of knowledge that will increase participation. This motivation for research on participation in adult education, Courtney (1981) believed, has restricted the development of the theoretical background, and he felt that a more multidisciplinary approach would be beneficial and would encourage a move away from the one-dimensional nature of much of the research.

Vocational education and training in higher education

While it is not our intention to replicate reviews of research on higher education, this area has produced some interesting findings related to the motivation of adults involved in general education. In some cases, these studies have also added to knowledge of vocational motivation. However, when applying the findings from higher education to vocational education, one must be cautious. It is possible that those adults who participate in higher education are 'different' from those who participate in other forms of education in terms of their class, the kinds of barriers they encounter and previous educational experience. These factors may affect the nature of their participation and so inhibit generalisations to the whole adult learner population. So what has research on higher education contributed to the study of adult vocational education?

Goodyear (1975), in a study of motivation in higher education, found that students gave two different kinds of explanation for their return to education and training. One reason was the desire to obtain a specific qualification to achieve job promotion. The second was a wish to improve or to compensate for inadequacies in life in a wider sense; a form of 'second chance' education, facilitating career advancement or broader, psychological goals.

Houle (1979) believed that there was a more complicated interrelationship between an individual's motives than was often thought. He collected data before the adults selected a particular course. These data revealed a range of motives for participating. Not just the motive one would expect from the type of course a person attended. For example, return to a vocational course might have a non-vocational motivation or a mixture of motives. This illustrates that the orientation of the course does not necessarily reveal the underlying motivation.

Taylor, Morgan and Gibb (1981) differentiated between motivation and orientation in their work. Motivation was seen as the attitude of the adult to participating in study, orientation as the attitude to the course content and mode of delivery. They defined four familiar orientations: vocational, academic, personal and social. These appear similar to the Houlian-type (1979) categories of motivation.

Some studies have identified age and gender differences in motivation. For instance, Roderick, Bell, Dickinson, Turner and Wellings (1981) found that vocational and career-related motives were less important to adults in their late 20s and 30s than they were to those adults in

their early 20s. MacDonald (1983) also found a gender difference in motivation: men gave vocational reasons for studying, whereas women emphasised widening their outlook on life, obtaining mental stimulation and gaining relief from domestic routine.

Particular and group-based research on motivation

In areas other than higher education, motivational differences between subgroups have also been found. Some of these groups, such as the unemployed, can sometimes be further subdivided by age and class; for example, Munday and Munday (1983) in their survey of the unemployed in Northern Ireland found that unemployed males in their 30s saw adult education and training as a means of securing employment and coping with the material problems of unemployment. Indeed, over 75% of all respondents paticipated for vocational reasons. There were differences when they examined certain subgroups. Those under 35, more than any other group, participated for mainly social reasons.

Much of the information on motivation in adult education and training arises from studies which have motivation as one of several foci. Such research is often very specific but can contribute to developing hypotheses about motivation by adding to knowledge about the contextual factors which affect the motivation of adults. One such study by Marshall and Johnson (1983) looked at educational opportunities for women in WEA provision. They found that the most common reason for participation was to meet other people - a social motivation. Second was the desire to broaden horizons and expand self- development through the acquisition of knowledge. The third most important reason for participation was to get away from domestic routine. The search for greater self-confidence was also frequently mentioned. A minority of respondents stated that they were participating for vocational reasons. Note that here we can see that typologies of adult learners can be applied within groups.

Does marketing affect participation/motivation?

Whether better dissemination or marketing of adult education and training will increase participation was looked at by Selby (1982). He reviewed past research on factors influencing participation with the aim of suggesting how improvements could be made to the image and overall marketing of adult education. He pointed out that early educational experiences can alienate substantial sections of the population. He estimated that 50% of the adult population had come into contact with adult education at some time. However, he added that many left because of dissatisfaction and that this dissatisfaction was likely to be communicated to other adults. Selby (1982) stated that much of the research on adult education in general (for instance, Underwood 1974) has highlighted inadequacies in areas such as teaching, supervision, guidance and counselling and the presence of barriers to participation. He argued that these, combined with the possibility of previous unpleasant experiences of education, could make adult education a less than attractive alternative to the other activities competing for an adult's time. Adult education, in

all its forms, therefore, had to be seen as a product or service that has to 'sell itself' to potential learners. He suggested that an increase in motivation and participation might occur if the adult population were effectively segmented on the basis of needs and likely useful benefits, and if these subgroups were appropriately targeted. He argued that, just like other services or products, adult education courses have to be shown to have benefits in order to attract clients. Selby (1982) continually stressed that research showed the role of adults as passers-on of information, and suggested that once aware of and impressed by adult education, such clients would be a major form of promotion for it.

There is a growth in recognition of importance of marketing adult education in some sectors of educational provision. The Further Education Unit (FEU) (1987) has undertaken work concerned with marketing adult education in further and higher education. The research included looking at potential demand and actual participation in adult education and training in England. The most important factors in motivating adults to participate were, first, personal interest and enjoyment: second, the need to improve job prospects; and third, the need to gain knowledge required at work. Publicity about local further education had reached 62% of respondents and the most effective forms were identified as local newspaper advertisements, displays at public events, and posters and leaflets. The researchers also made recommendations for further education provision and marketing which included the need for an overall marketing strategy/policy; co-ordinated efforts and activities; systematic application of procedures; upgrading the marketing function and assessment of marketing activities by those involved in providing further education.

Norris (1985) argued that non-participants are usually ignorant of the range of potential benefits courses can give and the usefulness of adult education and training. Norris attributed this to little or poor dissemination by the various educational institutions. This appears to contradict the FEU study (1987) findings which stated that information about local further education was reaching 62% of people questioned, but this may be because Norris' study (1985) largely predated recognition in some adult educational sectors that active marketing was necessary. The FEU study (1987) is probably measuring the successful effects of active marketing by the further education sector. It remains to be seen whether other educational sectors (especially other public providers) are taking up 'targeted' dissemination and marketing of their services.

Cannon (1988) emphasised the importance of effective marketing too. Cannon found, in a study of Scottish further education colleges, that there was a great awareness among staff of the need for effective marketing. However, lack of resources and time were said to hamper actual developments. Cannon (1988) argued that marketing is essential because traditional 'recruitment areas' for colleges (such as traditional industries) were declining. Colleges, therefore, had to appeal to a wider, more diverse market in order to survive. Cannon (1988) also stated that effective marketing and investment are needed to overcome the image of further education colleges as 'run down' or unattractive. This was especially important in attracting local employers and mature students. Cannon's report (1988) urges further education colleges to identify their markets

more clearly and to segment them according to the characteristics of groups of potential users. Cannon (1988) also recommended that a national further education marketing unit be set up, with additional backing coming from regional units.

So far we have concentrated on adults' general motivation to return to education and training. Let us now turn to research on motivation during participation in courses.

Factors affecting motivation while attending courses

May (1985), in her study of adults in non-advanced education, concentrated on exploring factors affecting adults' motivation and their subsequent persistence with a course. She found that where discrepancies existed between the adult's expectations and subsequent experience of the course content, level and presentation, in terms of being worse than expected, drop-out was likely to occur. She found that a predictor of overall satisfaction with the course was its educational content but the actual attendance behaviour was predicted best by the student's perception of the teacher's qualities. She also suggested that this may help to explain why some adults do not define themselves as drop-outs from education, but rather as 'shopping around' for the right type of course in terms of teacher qualities, content and level.

Rosenblum and Darkenwald's work (1983) also sought factors which might affect adult motivation once on a course. They tested the hypothesis that involvement in the planning of the course by those adults participating in it would increase motivation, and might, in turn, show in the satisfaction and sense of achievement expressed by them. When the adults on the 'test-course' were compared with those of others who had not been involved in planning, the researchers found no increase in motivation, satisfaction or performance.

Norris (1985) confirmed past research findings on the motivation of participants. He found evidence that: the processes involved in being a member of a class or learning group are as important as the learning gained; a student's commitment to the student role can be predicted by his/her commitment to 'homework' and willingness to engage in class activities; the kinds of interaction possible within the class are largely determined by the style and methods of the teacher (see also Sullivan 1984 below); the expected benefits from a course can lead an adult to enrol but the satisfaction gained from that course, which may lead to continued participation, can be different from that originally foreseen; adult learners may have two independent kinds of motivation, one related to social needs and the other to 'serious study', and a particular course may satisfy either or both of these needs; attending a course may be a subsidiary aspect of a more important leisure or work activity; finally, an adult's motivation may change during a course.

Some research projects in the UK have included an analysis of the motivation of adults participating in courses, but such work often appears as a 'side-line' to another area of study. One such study by Sullivan (1984) studied the drop-out rate in adult education and training courses as a measure of instructor/tutor effectiveness and quality. His hypothesis was that those tutors with specialised adult education training would be more effective than those with 'ordinary' teacher

training. Working from the Human Capital perspective, he stated that teacher effectiveness would affect the motivation of adult learners and therefore their drop-out rates. The Human Capital theory basically holds that people will take part in an activity from which they can gain something, and when the activity ceases to be profitable the person will cease the activity. Drop-out rates were seen as an indication of teacher ineffectiveness, and Sullivan (1984) did acknowledge that this is only one measure of teacher effectiveness. His subsequent research did not uphold his theory. Teachers and tutors were found to have a very small effect on student motivation and drop-out, with other factors (such as student characteristics and personal circumstances) being more important. This finding appears to contradict the findings of May (1985) who stressed the importance of tutor performance as a factor in the motivation of students. However, Sullivan did find some evidence to suggest that the qualities of teachers did affect, to some degree, the decision by learners to follow up their adult education with subsequent education.

Research on vocational education and training

As we said in the introduction, UK research specifically on motivation in vocational education and training is only now appearing in a form which is available. It is only recently that such research has been included in specialised bibliographies and databases. As much of this literature is still being collated, the information we have to report initially on motivation in vocational education and training is sparse. It should also be said that there is more work reported in North America than in the UK.

The US work tends to be large-scale and more policy-orientated than similar UK research. However, the findings of North American research can be informative for comparative purposes. White's (1978) study of US adult vocational education found that adults rarely entered vocational education courses to gain skills to seek 'immediate employment'. Rather, they enrolled to upgrade previous training or to learn new skills in order to change to better jobs. Adults also enrolled to obtain entry into advanced training programmes. Planning for future employment and proposed career skills did feature in the motivation of some adult learners but usually as part of a long-term plan rather than as a reactive response towards immediate employment needs. (This contrasts with some UK findings on the motivation of disadvantaged adult groups, such as the unemployed (Munday and Munday 1983). White found that enrolment on vocational courses for leisure purposes was rare but did occur. However, examples of such cases were not given.

Nero (1975) explored the sociological and psychological impact of mid-career changes on women in the USA. This project included a study of the motivation of adult women who wished, after spending time out of the labour market because of family commitments, to participate in vocational education. Nero (1975) found that the primary motive for such participation was financial. This again illustrates a difference between US and UK research findings. Most previous UK research shows that women appear not to have a strong vocational/financial motivation. Rather, they participate for social or personal interest reasons (these findings may now

be outdated as female employment assumes a more important role in British society). The relatively recent importance of obtaining more skills to compete in the UK labour market may also affect the motivation of other groups in British society and thus alter the dominance of 'desire for knowledge' as the most important reason for participation in adult education and training.

A recent research project undertaken by the Humberside College of Higher Education (1988) which studied the accreditation of in-house training, found that 78% of respondents (all in employment) taking part in study and training (inside and outside work) were aiming to achieve recognised qualifications. When asked why they were studying, 56% of the respondents stated that it was to improve their work skills, 40% were studying for their own personal interest, 36% said it was to increase their earnings and 22% because it was required of them by their employers (46% of the latter were aged 18-21 years). Only 10% of the respondents were hoping to change jobs, but, as the authors point out, it is possible that some respondents were reluctant to give this response since the survey took place in their current workplace.

When the study looked at employees' reasons for non-participation in education and training, they found that lack of interest was the most frequently mentioned (36%). The second most common reason concerned time involved in studying. This was differentiated between time spent to get a qualification (24%) and time needed to attend (22%). The third most common reason was the cost of courses. This research also showed that age appeared to be an important factor affecting motivation. Of respondents who gave lack of interest as their most important reason for non-participation, 47% were over 30 years old. This age group has also been shown in other surveys (eg ACACE 1982), to be less concerned with obtaining more vocational qualifications. This age group also possessed the highest percentage of adults who were deterred by the time involved in studying; in addition 50% of this age group said that available courses did not meet their needs.

When this study looked at what would increase the motivation of employees to participate in in- company training, 84% of the respondents stated that they would attend more if in-company courses led to recognised qualifications. An exception to this were cleaning and domestic staff who were not significantly in favour of obtaining more qualifications. Two other factors which respondents stated would encourage them to study more were the accreditation of their in-company training (by this we assume they mean for in-company use, as opposed to nationally recognised qualifications), and secondly, if the in-house training helped their private studies.

Comment

Research which has looked at motivation by studying the adult within his or her educational environment but which has neglected to examine wider socio-psychological circumstances appears to provide us with a shallow picture of such motivation. It has little to tell us about why and how motivations form and influence behaviour.

In some cases, especially in the USA, attempts have been made, using complex statistical procedures, to add meaning to data which do not contain in-depth information. The danger with such methods is that misrepresentation of the actual content of the data will occur. This is due to procedures such as factor analysis being prone to associating factors which have a statistical affinity but no meaningful or sensible association. This becomes more likely the larger the data set becomes.

Most of Courtney (1981)'s criticisms of motivational research still appear to be relevant. The greater part of the research that we have come across looks at motivation within the confines of the educational system and excludes the influence of wider societal factors. Education, whatever its level or orientation, does not take place in a vacuum, but, rather, in the context of the social world.

In much of the literature we have reviewed, there is an absence of work looking at vocational education and training. However, it is encouraging that, in looking at very recent UK research, there does appear to be a surge of interest in the field of adult vocational education and training. It is too soon to say if there is a dominant methodological approach. It is also difficult to assess whether this emergent research contains much analysis of the motivations involved in participation. Our impression of this literature is that it is diverse and consists largely of particular, narrowly focused work. This makes it difficult to present overall generalisations about the state of knowledge on motivation in adult vocational education and training.

3

CHARACTERISTICS OF PARTICIPANTS AND NON-PARTICIPANTS

In the study of adult education and training, the collection of demographic data can help identify factors which influence participation. Here, there is, of course, overlap with the study both of motivation and of barriers to participation. Demographic factors, as we shall see in this chapter, play a major role in shaping the motivational drive involved in participation. The ways in which the social background of an adult can inhibit participation will be looked at in detail in the next section.

Demographic characteristics of adults include aspects such as age, sex, socio-economic status (in the US), class (in the UK), working status and marital status It is generally agreed that such characteristics offer descriptive profiles of both individuals and groups but, used alone, they cannot explain why individuals and groups with similar demographics act the way they do. Usually qualitative data are added to demographic analysis in order to obtain a better understanding of social groups and the processes involved. A number of such studies are reported below. This section largely concentrates on the work of ACACE (1982) and of Munn and MacDonald (1988). These two surveys provide us with the most recent generalisable information on demographics affecting participation, especially in vocational education and training. Both surveys look at participation within the UK, the former in England and Wales and the latter in Scotland.

Demographic factors and their influence on participation

Social class/socio-economic status

Perhaps the most important, and most debated, demographic characteristic used in the study of participation is that of social class or socio-economic status (hereafter referred to as social class). Social class as a concept gives problems in that there is lack of unanimity about what is important in assessing the social class of individuals. In demographic analysis, variables chosen to represent class may differ slightly and debates arise on the procedures associating class and participation. However, findings in UK and US research indicate that the range of characteristics collectively seen as 'class' does appear to be an indictor of particular social factors which affect participation.

The Johnstone and Rivera (1965) study claimed that social class and course content were related. Adults of low social class were more likely to enrol in vocational courses whereas adults of higher social class were more orientated to general, aesthetic or recreational education. Similarly, Oakes (1976) found that educational experience in the form of length of initial education and qualifications gained, both indicators or sub-variables of social class, affected participation. In addition, he found that adults with lower educational achievement were more likely to enrol in

vocational courses whereas those adults with at least college-level education were more likely to participate in general education.

London, Wertert and Hagestrom (1963), Botsman (1975) and Bergsten (1977) also looked at how social class and related factors influenced participation in adult education and training. London *et al* (1963) found that adults studying at home as part of their job were usually of higher social class and had higher participation rates in continuing education than lower social class workers who had jobs which did not require study at home. Botsman (1975) stated that 'blue collar' workers expressed an interest in educational activities but were often prevented from participating by barriers such as cost of tuition, domestic responsibilities, lack of time and the cost of learning materials. This raises the point that even when adults from a lower social class wish to participate they are restricted or prohibited by barriers that affect their class more than higher social classes. Such findings illustrate the inter-relationship of a variety of demographic factors affecting participation. Bergsten's (1977) study concerned Swedish workers of lower social class, with limited educational experience (determined by time spent in education and level of qualifications gained) who wanted to take vocational courses. He found that among these workers, those who were satisfied with their work were more likely to be interested in attending courses which would provide new skills for their current job. On the other hand, adults who were dissatisfied with their work were interested in obtaining skills which would equip them for a new job.

Aslanian and Bricknell (1980), in their large-scale study of adult education in the US, noted that adult learners differ in several respects from non-learners. Learners are younger, better educated, wealthier, disproportionately white, employed in better jobs, unmarried or married with few children and are more likely to live in urban areas. Many of these characteristics indicate that the learners are from the higher social classes.

Anderson and Darkenwald (1979) attempted to go beyond the descriptive use of demographic data by using multi-variate analysis to examine both the inter-relationships between age, sex, race and social class and their effects on participation in the US. Their findings were similar to those of previous studies of participation in adult education. They stress that income, age and occupation are independently associated with participation whereas race and sex probably do not have a significant independent effect on participation. Their findings on the demographics which act independently on participation do appear important when set against other research. For example, as far back as the work done by Johnstone and Rivera (1965), there was a suggestion that the demographic variables of occupational status, income and schooling (all elements of social class) contributed most to the variation in participation. Other demographic variables such as age, sex, marital status and place of residence contribute to participation but this becomes pronounced only when added to the social class variables. This contrasts with the findings of Anderson and Darkenwald (1979) which suggested that age is not a subsidiary variable in participation but is an independent demographic variable. Courtney (1981) pointed out that these important social class

variables affect not only participation in adult education and training but also other forms of social participation.

In the UK, ACACE (1982), in their survey of participation in England and Wales, found that those adults from the AB social group (higher or intermediate professional, managerial or administrative occupations) had the highest level of participation in post-initial education. In addition, both sexes in the C1 group (supervisory or clerical, junior managerial, administrative or professional occupations) showed a high level of participation. ACACE stated that those in this social group are in jobs which require a standard of education that is above the minimum level. Those in the C1 group may also have aspirations to make further progress. The ACACE survey also found that in the AB group, fewer women than men had participated in the past. They suggested that this is probably due to women in this group not being subject to the degree of training or re-training found in the majority of 'male' AB occupations. However, more AB women than men had been in post- initial education at the time of the survey. This was possibly due to a greater availability of leisure time and a desire to 'catch up' with the husband. These findings, ACACE believed, mirror the data gathered in the 1978 General Household Survey.

In a survey of participation throughout Scotland, Munn and MacDonald (1988) found similar social class patterns to those of the ACACE (1982) study. Nearly three-quarters of those adults in the AB social group had participated in adult education and training, whereas over three-quarters of those in the DE group (semi- or unskilled manual workers and the long-term unemployed) had not. They stated that this relationship between social class and participation in adult education and training has also been found in work by other researchers (for example, McIntosh, 1976; NIAE, 1970; and Horobin *et al* , 1987).

Munn and MacDonald (1988) also found that non-participants in general, and adults from the lower social classes in particular, were disadvantaged in terms of their formal educational qualifications and were less likely to have stayed on at school after the minimum school leaving age.

To summarise, it would appear that the social class of an adult is an important variable in determining his/her likelihood of participating in adult education and training. Indeed, Osborn, Charnley and Withnall (1984) in their *Review of Existing Research in Adult and Continuing Education*, stated that research evidence shows an adult's social class background is the most important demographic variable influencing participation, more important than sex and possibly more important than race. In short, they concluded that social class is the great segregator in our society.

In addition to social class, the literature suggests that other demographic variables are important. They might not be as fundamental in their influence as social class but they are important as mediating factors. The two most commonly mentioned are *gender* and *age*.

Gender

Nearly all the literature we reviewed produced similar findings on gender. In general, of adults who have participated in education and training, men are more likely than women to have chosen work-related courses. The word 'chosen' may be inappropriate in many cases as there may be other important factors affecting participation in vocational education and training.

ACACE (1982) found that 63% of male participants had taken courses related to their work compared with only 25% of women. Munn and MacDonald (1988) found very similar patterns when they asked what participants' most recent courses were related to; some 60% of men compared to 23% of women stated that their course was related to the job they were doing at the time. Munn and MacDonald (1988) pointed out that such differences may not be the result of personal preference but rather of the circumstances in which men and women find themselves. For instance, gender differences in the workforce (with more men than women in paid full-time employment) might provide a partial explanation. Since Munn and MacDonald (1988) did not collect data on the adults' work status *at the time they returned to education and training* they were unable to compare the proportions of men and women taking courses which were related to their jobs with the proportions actually in paid employment.

Munn and MacDonald (1988) also showed gender differences in the courses chosen by participants. Men were more likely to have taken courses in explicitly vocational subjects such as business/management or engineering. Where women had chosen explicit vocational courses, they were concentrated in those areas which have a high proportion of females in the workforce: for example, more women than men chose secretarial studies and nursing. It is worth noting that, in this survey, far more female than male participants had chosen handicraft and leisure courses.

Munn and MacDonald (1988) also found that gender differences in the purposes of courses influenced a whole range of related factors: for instance, the mode of attendance differed, with more women than men having taken evening classes. In contrast, men were more likely to have attended full-time, day release or sandwich courses. Similarly, in paying for the course, men were more likely to have been financed by their employer, whereas almost twice as many women as men had paid for the course themselves. Gender differences were also found in terms of the certification for courses taken: 53% of men but only 37% of women said that their course had resulted in a some kind of certificate. In terms of future educational intentions, Munn and MacDonald (1988) found that there was a greater interest in courses related to their current employment among males but rather more women than men said that they were interested in taking courses which were related to jobs that they hoped to get.

These findings on vocational orientation would appear to reflect underlying gender differences and structures present in the labour market. Such findings are typical of other UK adult education and training survey data and the same gender patterns can be traced back to the NIAE (1970) survey.

Some UK research shows that women participants are concentrated in certain institutions, especially in colleges of further education (Bell, 1976). Moreover, Burwood and Brady (1978) found that social class also affects the gender composition of participants in further education colleges. Working class females were greatly under-represented particularly on GCE courses as distinct from TOPS courses (GCE courses are usually seen as being higher level and more general in scope than courses such as TOPS). This reminds us of the inter-relationship of demographic variables and the pervading influence of social class.

UK surveys have also revealed large differences between the sexes in the reasons given by non- participants for non-return. As one might expect, women are more likely than men to cite child care and other domestic commitments (ACACE, 1982; Munn and MacDonald, 1988). In addition, far more females state that vocational education would not help in the job they do. This may be linked to fewer females being in full-time paid employment and to the type of employment where training is viewed as unimportant (Munn and MacDonald, 1988). ACACE (1982) looked at the reasons adults did not follow a course they had wanted to take. Men were more likely than women to say that they had been unable to get time off work. On the other hand, family opposition had been important in women's decisions not to participate. It is interesting to note that in the Munn and MacDonald (1988) Scottish survey, such family hostility was not apparent.

These gender differences should not be allowed to obscure the fact that, amongst both men and women, lack of interest was given as the most common reason for non-participation in the Munn and MacDonald (1988) study, and cost in the ACACE (1982) survey. These and other barriers to participation are considered in more detail in Section 5.

Age

Age is another variable that affects the desire to participate in vocational courses. The literature suggests that as people grow older they become less interested in taking vocational courses. Munn and MacDonald (1988) stated that those adults who were less likely to participate in vocational courses related to their current employment were aged 55 and over. In terms of courses which might be related to future employment, it was typically those aged 45 and over who expressed least interest.

Munn and MacDonald (1988) found that the majority of adults who expressed an interest in taking vocational courses in the future were aged 20-24. While they stress that statements of future intent are not infallible predictors of demand for such courses, their findings appear to point to a group of adults who have the motivational drive and inclination to participate in vocational courses, given that they can identify educational programmes that they see as useful and can also overcome a range of potential barriers.

Comparisons between UK and US findings

How do UK demographic patterns of participation compare with recent US survey findings on similar types of participation?

Saindon and Long (1983), using a large US survey, found demographic differences between those adults who participated in general education and those who participated in vocational education. They found that while participation declined with age in both forms of education, participation in vocational education declined far less sharply. This contrasts strongly with UK research where the usual pattern is a decline in participation in vocational education as age increases. Perhaps this reflects a greater popular perception of the need for vocational education in the US.

Saindon and Long (1983) also found that participation in general education rose sharply with level of educational attainment but participation in vocational education declined with educational attainment. The highest level of participation in vocational education occurred in those adults with some college (further) education. This finding is similar to UK survey findings reported in this chapter. Perhaps we are seeing similar class effects in participation in the UK and the US, but a stronger cultural appreciation of the value of vocational education in the US.

Another finding of Saindon and Long (1983) that appeared to contradict the UK pattern concerned income. They found that as income increased, participation in general education decreased. This appears unusual, and dissimilar to participation patterns in the UK. They stated that this finding was the only one that differed from similar US studies and that it may have been due to the inclusion in the sample of school leavers who joined the labour force. They pointed out that the relationship between income and vocational education was similar to other US studies in that adults earning high salaries participated more in vocational education. The exception to this were those adults who earned the highest income. This finding is again contradictory to the UK findings shown in this section, where participation in vocational education decreases with income and class. Again this might reveal something about the perceived importance of vocational education in the US.

Overall, Saindon and Long (1983) summarised the demographic differences associated with participation as follows. Participants in general education and vocational education differed in terms of their background. Participants in general education were younger, more likely to be female, to have a college degree and to be employed as a professional or technician. Participants in vocational education tended to be older, were more likely to be male, to have had some college education and employed as a service worker or in the skilled crafts.

Limits of demographic data

There are limits to the extent to which demographic data can help in understanding participation rates. Anderson and Darkenwald (1979) summed up these limitations. They said that demographics do not tell us *why* adults participate in adult education and training, they only

describe those participating or not participating. In other words, demographic data cannot explain what it was that initiated the adult's interest in participation. Anderson and Darkenwald (1979), therefore, saw the need for more explanatory and meaningful work to supplement demographic information.

In the case of demographic analysis based on social class, it can be argued that it is a concept tied to the norms and values of a particular time and society. For example, class based solely on the occupation of male head of household will affect the categorisation of certain adults. This appears to be a valid point but will be argued for a long time to come, as different schools of thought and ideologies attempt the almost impossible, to define 'true' class.

There is also the problem of comparisons between nations based on the demographics of adults. In the construction of demographics, the criteria used will differ to varying degrees according to whom they are produced by and the reasons for their production. Researchers must remember this and bear it in mind when examining such data.

Comment

It would appear that, in the UK and US, there are certain demographic attributes of adults which affect the nature of their participation in education and training. Such variables alone do not explain *why* some adults participate, nor the *ways* in which they participate. Demographic information, however, is valuable in revealing the factors which might influence the participation of certain groups of adults.

Despite the uncertainties about the precise meanings of some demographic variables such as social class, we can identify the more fundamental demographic factors affecting vocational education and training. These appear to be age, gender and social class (if this is taken to reflect educational attainment and employment status). With the exception of age, the effects of demographic characteristics appear to be similar in both the US and UK. To simplify, the pattern appears to be that the higher the social class, educational attainment, and income of adults, the less likely they are to participate in vocational education. One explanation for this could be that these adults feel that their initial and higher education was sufficient to facilitate their entry into higher status employment.

The literature on demographics appears to suggest that gender differences in participation in vocational education reflect differences in the labour market. More men than women are in paid employment (especially full-time employment) and are therefore more likely to receive in-company and other work-related training. And, because of its direct relevance to their working situation, men are also more likely to think of such education as useful. In addition, there was the suggestion in some of the literature that the industries in which women tend to predominate are those which do not place an emphasis on providing continuing education for their staff. Such labour market differences were also reflected in findings which suggested that women were more likely than men to be seeking vocational education which would prepare them for future

employment. Domestic commitments often mean that women take a break from employment and so their educational requirements become focused on courses which update their employment skills.

As we have shown, demographic data have something to tell us about which groups are likely, to participate, or not participate. They also emphasise the differing needs of these groups. To explain why these differences occur however, we have to turn to more explanatory studies to provide such information. This we do in Chapter 4, where we discuss what the literature has to say about the barriers to participation encountered by different groups.

4

BARRIERS TO PARTICIPATION IN EDUCATION AND TRAINING

In terms of the amount of research done and subsequent literature produced, the study of barriers and problems affecting participation in adult education and training is second only to the study of motivation. The two subjects are obviously related. For instance, the strength of an individual's motivation to participate may overcome many potential barriers (Knox, 1976), but where barriers are persistent or insurmountable they may adversely affect the strength of motivation (Kidd, 1973).

We have found that work on barriers specific to vocational education and training is scarce. When it does occur, it appears, as one might expect, in US research. In addition such work appears in larger scale survey research on a range of aspects of adult education. There is also some research on how barriers affect adults in specific contexts such as being unemployed, these are often in the form of case-studies.

Types of barriers

The literature suggests that barriers fall into two types:

- psychological barriers, for example an adult's attitudes to, and perceptions of, the usefulness of education and training;
- situational or external barriers, for example, finance, domestic commitments and travel problems.

An apparent exception is the work of Carp, Peterson and Roelfs (1974) quoted in Cross (1981). They identify three types of barriers. Firstly, there are situational barriers such as cost. Secondly, there are institutional barriers such as the time required to complete a course. Finally, they identify dispositional barriers such as an adult's perceptions of when it is appropriate to participate. For instance, some adults might think themselves as being too old to go on courses.

However, it would appear that while there is some distinction to be made between barriers (such as the cost of a course) and institutional barriers (such as the time-scale set down for a course), both are external to the adult's control and can, therefore, be seen as falling into situational or external barrier types. The dispositional type of barrier appears to be simply another way of categorising psychological barriers.

Most work on barriers, then, tends to focus either on how psychological barriers to education and training develop, or on how the individual is affected by situational and social factors that act as barriers. We now turn to the literature on each of these types of barrier.

Psychological barriers

The study of these barriers usually falls within the area of motivational research which looks at psychological processes that give rise to, or affect, motivational drives as reported in Section 3. Here, we summarise the major psychological barriers to returning to education and training.

ACACE (1982) identified one particular psychological factor which can act as a strong barrier. This is the 'entrenched attitude that education for adults is less important than education for children'. We assume that this is describing a general attitude to adult education held by the general population.

The literature strongly suggests that views of the usefulness and role of education are developed early in life, ie before adulthood, with initial education playing a major shaping role (for example, Trenaman, 1957). Much of the literature reviewed in Sections 3 and 4 supports this. For instance, unpleasant schooling experiences may affect the individual's attitude to education and, in turn, may adversely affect his or her wish to participate in adult education and training later in life.

Munn and MacDonald (1988) found that the most commonly cited reason for non-participation was 'not really interested' (39% of all non-participants). The authors point out that other reasons such as 'have not got the time' (cited by 16% of all non-participants) may be socially acceptable euphemisms for lack of interest. Such responses are intriguing but may mask a range of factors that are responsible for an adult's lack of interest. For instance, there is the possibility that an adult may now perceive education to be of little use, but this present lack of interest in participating may have been strongly influenced by other factors now forgotten or repressed.

Many studies (for example Boudon, 1974; Bourdieu 1973; and Halsey and Karabel, 1977), have shown the influence of social class on perceptions of education and training. Social class seems also to be highly correlated with responses to educational opportunities. The influence of social class and experiences before adulthood alert us to the interrelationship between the formation of psychological barriers and the person's social environment. Often attitudes may be formed by interaction with this environment and by key events in life. This will be looked at in more detail later in this section.

Situational/social barriers

Educational activities may be perceived by some people as not really useful to their lives. Other factors also likely to influence participation (and affect attitudes to education), can largely lie outside the individual's control. These are identified as situational or social factors.

There can be many such factors. They include the range and availability of suitable courses; effective dissemination of information on such courses; the cost of courses; and admissions procedures. Domestic commitments as barriers are almost inevitably gender specific, being applicable mainly to women and, because of this, most research on such barriers overlaps

with the study of barriers affecting certain subgroups. Therefore, we have more to say about domestic commitments as a barrier when we look at social groups and barriers.

We found that the literature on situational/social factors rarely concentrates on barriers to *vocational education and training*. Rather, barriers are examined in terms of how they affect participation in educational activities in general. Within this literature, however, we can sometimes tease out factors that are particularly relevant to vocational education and training. The absence of such specifically focused literature may be understandable in that many barriers can be seen to affect participation regardless of whether the adult wishes to participate in vocational/training or general educational activities.

The ACACE (1982) survey found cost of courses to be the largest single barrier to participation for both men and women. Ties to dependents, lack of suitable courses, lack of time off from work and ignorance of what is available were given as other barriers. These can be seen as situational barriers, although lack of knowledge about provision, which was mentioned by one-fifth of respondents, may be either a result of a personal attitude to the active searching out of educational opportunities or the product of poor advertising/marketing by providers.

The findings of Munn and MacDonald (1988) concerning reasons for not participating in adult education and training in Scotland contrast strongly with those of ACACE (1982). In the former survey the respondent was given the option of citing lack of interest among reasons for not participating. Munn and MacDonald (1988) found that cost, rather than being mentioned as a major barrier by the general population, was a problem mainly expressed by those in the DE social class group, (semi- or unskilled manual workers and the long-term unemployed); 13% of the DE group compared to around 6% in other social classes, mentioned cost as a barrier. It is difficult to say whether national variations in the different findings of the two studies reflect differences between the two populations or differences in the wording of the question. More important situational barriers were found by Munn and MacDonald (1988) to be domestic commitments. As found in similar research, and as one might expect, this barrier applied mainly to women and those adults aged within the 20-44 range. Time constraints also featured strongly as a barrier, with this being mentioned more by those adults in the 25-34 and 45-54 age groups. However, social class effects were observed, with time constraints being reported least by the AB social group.

Munn and MacDonald (1988) also found that, among the barriers which we would classify as situational, the least cited were physical or medical problems, travelling difficulties and lack of support from friends, family or employers. In addition, lack of knowledge about providers was not reported by respondents to be a major barrier, even though non-returners were shown, in the same survey, to be unaware of many educational opportunities available to them.

Institutional policies and practices can act as situational barriers. Jones and Williams (1979) summarised some of the major institutional barriers. They stated that advanced full-time study receives the highest prestige from providers and, as long as this remained the case, the adult seeking re-entry in anything other than full-time study would be positively discouraged. Also a

lack of procedures among institutions to determine equivalence among courses and to modify entrance requirements meant that adults who were geographically mobile and/or who had changing social, economic, or family responsibilities were at a disadvantage. Jones and Williams also found an absence of admission and selection procedures which took into account the experience of adults. This militated against those adults who had few formal educational qualifications or who had had a gap from formal education and wished to re-enter education, especially at a higher level. Griffen and Smithers (1984) in their research found that, of the non-personal barriers affecting adults, most stemmed from the administrative systems of institutions. Ligget (1982) surveyed the attitudes and entry requirements applied by UK universities to adult students. It was found that most were discouragingly complicated and diverse.

It appears that there has been little work done which focuses on how these two types of barriers interrelate and how this interrelationship affects the formation of each type. For example, personal/psychological barriers may be reinforced by situational and wider social barriers. Some theorists would postulate that the situational or environmental factors greatly shape the adult's psychology (Skinner and the behaviourist school of thought). There is also the view that wider social 'structures' shape the potential of groups in society, for example, in the labour market (Marxist approach). However, we have found some literature which allows us to shed some light on this interrelationship.

The relationship between situational and psychological barriers

The work of Maslow (1970) gives us an insight into the relationship between situational and psychological barriers. From his work, we can see that people possess a hierarchy of needs. People within certain social groups can have a similar hierarchy of needs. For example, disadvantaged groups possess a hierarchy of needs which generally place basic, everyday life essentials as those imperative to be satisfied. Such groups will often be prevented from placing a priority on the higher order needs of achievement and self-actualisation (as identified by their society). A report by OECD (1979) illustrates this. The report brings together studies from a number of different countries concerning non-participation and barriers. The findings suggest that adults in such groups as the economically disadvantaged, elderly and 'blue collar' workers face the most severe barriers and are therefore less likely to participate than those adults who are more affluent, younger and have more educational experience.

The requirement that such basic needs as food and clothing are fulfilled may be one factor, or barrier, which restricts disadvantaged adults from participating in education and training. They may feel that they do not have the time to participate when faced with other fundamental demands on their time. It might also be that deferring employment and following a course would not give the immediate benefits a disadvantaged adult seeks, whereas taking a job or finding some other source of income/activity might. For example, Grainger (1979) found that, of working class mature student applicants who were capable of obtaining a place on a degree course, only one third

chose to do so. He stated that, when many disadvantaged adults are faced with the choice of education or employment, the disparity between educational grants and wages in employment is one reason for not going on to do a course. This was especially true of full-time courses. Grainger (1979) felt that this financial penalty contributed strongly to the non-participation of working class adults in education.

This research suggests that strong external and social barriers, such as financial problems or considerations, might reinforce an adult's perception of adult education and training as an activity one can participate in only when other more immediate needs have been satisfied. Adult education and training, therefore, might be seen as secondary to looking for and obtaining a job. If the education and training is effectively marketed as being useful in obtaining relevant skills that are likely to increase the possibility of entry into the labour market, then some groups may seek to participate. However, if such training is not within the financial reach of, or conflicts with the domestic commitments of, certain groups of adults, then, even if they wish to participate, the practical everyday requirements of life are likely to be placed before participation in education and training.

Miles (1956) found evidence to suggest that, if disadvantaged adults enter education or training, their performance on a course and continued participation may be adversely affected, not by intellectual factors, but by anxieties arising from whether or not they can fulfil fundamental needs, such as supporting their families.

Munn and MacDonald's (1988) work suggested that a hierarchy of barriers exists: for example, if adults have developed a view of education as unhelpful they will not seek to participate and so they will not experience further barriers. This can also be seen in situational factors. For example, if adults are prevented from participating due to lack of money or domestic commitments, they may not get any further along the path of applying and, consequently will not experience further barriers. Some barriers, therefore, are so fundamental to certain adults or groups that they can prohibit participation, while other, less fundamental, barriers or problems (eg complicated entry procedures) may only be experienced if an adult progresses further along the route to participation.

Barriers and social groups

Much of the literature on situational/social barriers overlaps with the work on demographic factors affecting participation presented in Section 3. Leading on from this, we now look at barriers and, social groups in terms of the processes involved.

Gender

Eliason (1981) looked at the barriers which impede the expansion of women's opportunities in adult vocational programmes in the US. She found that institutional barriers included inappropriate course arrangements and organisation: for example, course times often did not take into account the

domestic commitments of women. In addition, entrance requirements and assessment procedures were found to be generally inadequate in that adults' past experiences and non-formal education were often overlooked. Similarly, it was found that testing, when used, was more suited to younger students. Problems found to be especially relevant to women included domestic commitments, family conflicts (pressure from spouse and/or other family members), sexual harassment and, for younger adult women, parental attitudes. Here we see quite powerful social factors, such as norms of appropriate behaviour, affecting women and being reinforced by family members.

Eliason (1981) found that competition for jobs with male and younger females affected the opportunities of older women to obtain employment (especially higher grades of employment where training is more available) and to receive training in general. She also found that the quality of available counselling and advice for adult learners varied greatly and was generally deficient.

While not looking specifically at vocational education or training, most literature on barriers facing women who might wish to participate does provide us with common findings which appear to cut across types of education and national boundaries.

Perhaps the most commonly reported problem for women is domestic commitments. Lovell (1980) stated that domestic and/or financial constraints prevent more women than men from participating, with some women choosing courses which suited the time they had available rather than their interests. The Munn and MacDonald (1988) and ACACE (1982) national surveys (Scotland, and England and Wales respectively) found that far more women than men gave family/child care commitments as a reason for not participating. Henshaw (1980) found that family responsibilities and financial needs impeded women's participation. However, when women were successful in participating, this contributed to their self-image and confidence. This again tells us something about the nature of the relationship between situational/ social and personal/psychological factors that can act as barriers. When women overcome situational barriers, previous psychological inhibitors acting as barriers (such as lack of confidence) are also broken down. However, it is worth noting that studies concerning participation in education and training often report barriers which result from women being less confident about their abilities and less sure about their goals than men. Such studies include Hetherington (1978, USA), and Marshall and Johnson (1983, UK).

Women students often appear to be concerned with future employment opportunities. As we shall see, other research has shown that disadvantaged groups (including the lower social classes and groups within the unemployed) are concerned with obtaining employment and skills that will help them get a job. Hurman (1970) found that many women sought employment in the 'caring professions' and, correspondingly, courses likely to help them gain access to such employment. He believed that many women did not recognise opportunities in the so-called male-dominated professions, seeing them as restricted mainly to males, and so aimed for the 'traditional' female occupations. This perception of the opportunities available may reflect, and be reinforced

by, actual experience of situational barriers to male-dominated professions. However, such perceptions may still be held without actual experience of these barriers. Societal norms and organisation (situational factors), whatever their origin, can be imbibed by individuals and affect their perceptions (personal/psychological factors) of their potential and the resulting opportunities open to them.

Hart (1988) surveyed women who had attended a conference on adult education and training in Scotland. She found a great interest from these women in returning to education and training, and a demand for formal qualifications related to vocational goals. Many of the women in her study were seen as having long-term career plans and saw adult education as a means of achieving these goals. However, she also found that many of the needs of these women were not met. Respondents reported lack of advice and guidance about opportunities, lack of child care provision and problems in obtaining part-time education and training. These problems often arose because of financial or institutional factors (it would appear that the majority of respondents in Hart's (1988) research were not typical of women in the general population. They seem, from what descriptive data there are provided, to be more highly qualified (88% had some qualifications) and to be already interested in education and training).

Barriers in the form of gender stereotypes are reported even in the USSR. Frank (1977) found that men in the Soviet Union were twice as likely as women to obtain the equivalent of a PhD and that women made up less than 40% of research and academic staff. However, Ghaffari-Samai (1979) has shown that, in many countries, younger adults are less prone to accepting such norms and may, consequently, develop wider and higher occupational aspirations and choose applicable vocational education courses in the pursuit of these goals.

Socially and educationally disadvantaged adults

Large demographic surveys have shown a relationship between low rates of participation in education and training and both lower social class and a lack of formal educational attainment (see Section 3). We present here some research specifically on how social class and low levels of educational attainment contribute to low participation levels.

Research done by Tapper and Chamberlain (1978) is an example of research which has found that problems are cumulative for disadvantaged adults. They found that working class adults who had entered education as mature students were less likely to achieve as high an academic result as their middle class colleagues, if the latter had experienced a more extended initial education. It is possible that initial educational experience and other working class factors could have been affecting achievement.

In the US, Sexton (1976) reviewed work on how experientially-based education (acceptance and utilisation of the knowledge and experience an adult has accumulated from their life but which is not certificated) can help the economically and academically disadvantaged adult in vocational education. He began by stating that such adults were prevented from entering higher

forms of training and vocational education in two ways. Firstly, they often do not possess the formal entry requirements for such education. Secondly, their low level of educational attainment may prevent them from obtaining employment in which higher training and vocational education were seen as necessary. Sexton (1976) stated that experiential education was seen as being especially well suited to maximising the educational potential of these groups, by drawing on what they had learned and achieved through non-formal educational processes and their life experience. He noted that changes in the nature of the work in a society and the attitudes to work held by groups should also be taken into account when planning and marketing adult vocational education.

Difficulties faced by socially and educationally disadvantaged groups when attempting to enter adult education and training can occur even when many have overcome other potential barriers and actually reached the stage of applying. In the UK, Smith and Fraser (1978) found that the majority of adults who were unsuccessful in getting on to a course were those who had never participated before. When followed up and asked why they felt they had not got on to a course, most replied that they were unfamiliar with the entry procedures and did not have all the details about the course requirements. We must note that this research was done in the late 1970s and guidance and information on courses may have changed in some educational sectors. Their research does, however, point to the importance of good guidance and information for such disadvantaged adult groups.

The unemployed

The literature on the participation of the unemployed in adult education and training reveals that 'the unemployed' are not a homogeneous group. They consist of many subgroups, some larger than others, and are differentiated by such characteristics as social class, age, educational experience and attainment, time spent in previous employment(s), gender, ethnic background and length of time unemployed. What members of these different groups have in common is unemployment. Different subgroups may face barriers particular to them and can experience unemployment in different ways.

Senior (1984) looked at the unemployed in general and argued that behind the current educational provision for unemployed adults, are various assumptions about the nature of unemployment. These assumptions fall into two main types. Firstly, there is the assumption that unemployment is temporary and variable and results from a mismatch between demand for and supply of skills. This assumption, Senior (1984) stated, saw the solution to unemployment as being targeted training and retraining of those who are unemployed or likely to be so. The second form of assumption about the nature of unemployment is that it is a relatively permanent characteristic of modern society, and that unemployment will be experienced by many people periodically throughout their lives. The educational response to the second view of unemployment is seen as having to be much broader than that envisaged for the first. Such a broader concept of

education for the unemployed includes ideas of self-help, learning exchanges and community action. Senior (1984) believed that the second type of assumption was the more accurate and that education and training for unemployed adults should recognise the needs of the majority of the unemployed, the effects unemployment has on adults, and appreciate that unemployed people are individuals who will react to unemployment in ways specific to their personal perceptions and immediate social context. She, therefore, criticised recent government responses to unemployment, and the resultant educational measures, as too narrow, and failing to take account how adults' whole life experiences, their families and their communities are affected by unemployment. Given this, she recommended that educational opportunities and responses should be designed around the wide range of needs which groups of unemployed adults have.

Senior (1984) saw the fundamental barriers for unemployed adults to (suitable) educational opportunities as being institutional in origin. She felt that educational provision available in the UK was too inflexible to suit the lifestyles and needs of many unemployed adults, giving rise to a range of situational barriers. She also suggested that the longer an adult is unemployed the more likely he or she is to feel that the situation is unchangeable and hopeless. Subsequently, the various schemes and educational/training opportunities may be perceived as unhelpful by the long-term unemployed adult. This attitude could then act as a psychological barrier to participation.

Bryant and Titmus' (1981) work on the educational needs of the long-term unemployed in Scotland stated that most unemployed adults have an overriding and immediate need for paid work. This need may make it difficult for these adults to recognise or accept the priority of education, either for improving their employment prospects or enhancing their personal skills to 'take advantage of (partially) compensating alternatives'. This again reminds us how immediate situational factors can affect adults' psychological perceptions of education and may act as a barrier.

Bryant and Titmus (1981) looked at the long-term unemployed and found that, in the formal educational and training sectors, there existed certain inadequacies which could act as barriers to participation by long-term unemployed adults. These inadequacies centred mainly on the failure by planners and providers to address the question of the contexts, some of which can act as barriers in their own right, in which adults' needs are expressed. These contexts are:

(a) the primacy of assistance in seeking work over other goals,

(b) the lack of opportunities to assess personal circumstances and thereby decide what their learning needs are,

(c) the conventional nature of much education or training which may mean that, while the content may be suitable, it is outwith the reach of many long-term unemployed adults. This is due mainly to factors (d) and (g) below,

(d) the lack of material resources to conduct a thorough search of education and training opportunities, tied to a lack of knowledge of the available provision,

(e) the lack of confidence and/or motivation to seek help alone,

(f) for rural and small town residents, the distance from existing opportunities,

(g) the fact that some long-term unemployed adults have family commitments which limit their ability to take advantage of existing services.

Munday and Munday (1983) surveyed the adult education needs of the unemployed in general, in Northern Ireland. Their work also highlighted some of the barriers groups of unemployed adults faced concerning participation. Women were less likely than men to be interested in adult education. The group which perceived adult education as being useful (in employment terms) consisted of males in their 30s who saw education and training as a means of getting a job to cope with the financial and material demands of their families.

Charnley, McGiveney and Simms (1985) stated that, of the various groups which make up the unemployed, it was the older unemployed who found it most difficult to find paid employment. This was affected by the marketable skills that the older adult possessed. However, in general, most of the unemployed over 45 years old are in the unskilled and semi-skilled grades. These people are more likely to become unemployed and, once unemployed, they find it harder to get a job. As the length of time spent unemployed increases, material and financial concerns become increasingly important. Financial commitments, such as mortgages and other family expenditure, have to be met, often with dwindling resources. Therefore, the immediate demands on time and income are meeting these commitments. Charnley *et al* (1985) stated that courses leading to employment, including vocational and training courses and interview/self-presentation courses, are likely to be attractive to such groups. Charnley *et al* (1985) placed great importance on targeted information, counselling and advice on educational opportunities and rights regarding social security for these adults.

Problems while participating

Work in this area also overlaps with that on factors affecting motivation while on a course (see Section 3). Here, we highlight factors given in the literature on barriers which can prove difficult for adult learners and adversely affect them while on a course. The literature in this area again suggests that both situational and individual problems may cause changes in a person's motivation which may then lead to the participant reconsidering whether to continue with the course.

Belbin and Belbin (1966) undertook research into the problems older adults have when participating in training and retraining. They concluded that, from middle-age onwards, adults in a classroom environment require certain conditions to maximise their learning:

> Serious problems exist in retraining older workers, but where an appropriate method of training can be developed, older trainees can achieve results comparable with those of their younger colleagues. Specific requirements of the middle-aged learner include long and uninterrupted learning sessions, greater consolidation of learning before new skills are attempted, accurate responses and rapid feedback during learning, self-structured learning programmes, avoidance of competition and active mental participation during learning.

Underwood (1974), in a study of adult learners' reasons for participating and dropping out of education, found that situational factors played a fundamental role in whether the individual persisted with that 'episode of learning'. For example, how the quality of teaching and content of the course was seen was one of the most important factors affecting continued participation. He also found that adults were more likely to drop out if their performance dropped. This could be due to personal and/or situational factors, such as the cognitive ability of the adult and/or the quality of the teaching. Here again, we see how the study of barriers to participation overlaps with that of motivation.

A similar study by Wilkinson (1982) also found that a range of both situational and psychological factors was given for dropping out. These factors were seen by adults as originating outside their courses. Wilkinson stressed that his results could have been affected by respondents wishing to give polite reasons for leaving courses. However, he did note that some evidence exists to show that dissatisfaction with a course can occur and affect motivation. He therefore suggested that efficient counselling could help prevent adults choosing unsuitable courses and reduce drop-out.

Alleviating barriers to participation

It was difficult to locate literature which concentrated solely on problems while participating. Usually this information appears in research looking at wider aspects of participation. Some of the literature examines measures which could remove or lessen barriers to participation. Such work either appears as research specifically on how barriers can be removed for certain groups, or as a recommendation arising out of general or particular studies of participation in adult education and training.

One of the ACACE (1982) survey questions asked people who wanted to participate whether they were likely to need any form of assistance. Some 20% of these adults stated that they would. There were differences between groups: younger adults were, for example, more likely than older ones to express a need for assistance; and those in social class D expressed the greatest

need. The more common forms of assistance requested by all potential participants were financial and help with looking after children. Again, there were group differences: women up to the age of 45 expressing the need for child care and men under the age of 25 expressing most need for financial help. These findings on help needed by adults to overcome barriers are in accord with the findings, presented earlier, on barriers to participation. Finance, domestic commitments and belonging to disadvantaged educational/social groups appear to be the most prominent barriers. What, then, does the literature recommend to remove or lessen them?

Much research, both in US and UK, has emphasised the need for appropriate counselling and advice for adults both before and during a course. Ironside (1979), in Canada, identified a need for women's access programmes and services aimed at overcoming the effects of women's isolation and lack of information about educational opportunities. She found that women had lower expectations than men of their labour market potential. Consequently, they needed services which would update their expectations and help them work out ways to combine family responsibilities with employment.

Munday and Munday (1983), in their study of unemployed adults in Northern Ireland, identified the need for effective guidance and information geared to the range of needs unemployed adults can have. They suggested this should be supplemented by flexible access and by the provision of basic courses to boost confidence and provide the first steps to further education and training. By being flexible, these courses would avoid the possible situational barriers unemployed people face. Munday and Munday (1983) emphasised that such courses should seek to overcome possible psychological/personal barriers such as lack of confidence.

Senior (1984) argued that educational provision for the unemployed which has choice of content, is variable in form and is accessible to all who wish to attend is more suited to these people's lifestyles and is more likely to overcome the barriers the unemployed face. She saw distance learning as being this form of educational provision.

Paine (1982), in assessing the suitability of open learning for adults, looked at the barriers which could be alleviated by open learning. First, he identified thirteen barriers to participation in adult education and training. These are:

(a) the time is inconvenient,
(b) the place is inconvenient,
(c) the context is inappropriate,
(d) the adult has study skills problems,
(e) the cost is too high,
(f) the administration system is either too complex and therefore too daunting or inefficient and ineffective,
(g) the information supplied is either inappropriate or incorrect,
(h) family problems,

(i) self-confidence problems/fear of involvement,
(j) unpleasant memories of school/past education,
(k) general social problems,
(l) language/communicative problems,
(m) few or no formal educational qualifications.

He stated that some of these barriers could be lifted by effective marketing and organisational change (d, f, g and m). He did not appear to mention (e) here, which could in many cases be altered either at the institutional level, or at a higher organisational/policy level. Others, he argued, are outside the control of the provider and represent the core of disadvantage which is difficult to break down except by social services, social change and community development (h, i and k). One feels that, in some cases, barrier (i) could be alleviated by organisational change, for example, better publicity and presentation of courses portraying courses as 'user friendly' and staff as approachable. Paine (1982) stated that other barriers can be lifted through the development and effective use of open learning (a, b, c, e, g, j and l). It would also seem likely that effective marketing could help to lift (i) but this is not mentioned. Paine (1982) argued that open learning can match the flexible needs and circumstances of adults and that it should centre on learning rather than teaching. This, he believed, was more in keeping with adults' learning processes and lifestyles/events.

To overcome the barriers of lack of interest based on negative attitudes or limited knowledge of the nature of provision, Selby (1982) advocated targeted marketing of adult education and training. This would identify adult subgroups and focus appropriate information on courses likely to be of interest to them. He argued that courses have to capture people's attention and be shown to have benefits.

Wilkinson (1982) echoed many other researchers who have found a need for more and better guidance and counselling for adults, both before and during participation. He also found that few institutions follow up their 'drop-out students' to ask why they lapsed and to try and help them return. Wilkinson (1982) suggested that, if this were done, an adult's problems could be monitored more effectively and measures taken to overcome them.

In relation to alleviating barriers specific to vocational education and training, Saindon and Long (1983) in the US found that participation in training was associated with the ability of workers to develop skills on the job. Where this opportunity was not present, workers' attitudes to participation were negative. If workers were allowed first to develop their basic vocational abilities at work, subsequent participation in training was more likely.

Sexton (1976) found that barriers to vocational education and training for economically/ socially disadvantaged adults in the US could be lifted if providers accepted adults' experiences and non-formal skills (experiential learning achievements) in place of formal entry requirements.

If adults' knowledge of available educational provision is limited, it is reasonable to expect that this can limit their scope of action if and when they wish to participate in education and training. Adults' awareness of educational provision in the UK appears to be concentrated on local educational authorities, further education/technical colleges and evening institutes/adult basic education centres. This was found in the national surveys of both ACACE (1982) and Munn and MacDonald (1988), suggesting that the situation has not changed in the UK over six years and that other providers have to promote themselves more effectively. Munn and MacDonald (1988) also found differences in awareness between those adults who had participated in the past and those who had not. Participants were generally more aware than non-participants of educational opportunities. In addition, Munn and MacDonald (1988) found differences between social class groups in their awareness of types of provision available. For example, the AB and C1 groups were more aware of local authority and further education colleges than the DE group. Furthermore, in comparison to other groups, the AB group was more aware of Open University, university adult education and private educational opportunities. Interestingly enough, opportunities provided by schools and by community education services were identified by similar proportions of all social class groups. This may be due to effective promotion of these types of provision in Scotland.

These findings suggest that increasing knowledge about educational opportunities is no simple matter, as knowledge of much provision appears to be related to social class and changes here would require social and attitudinal changes. However, it may be possible to raise the awareness of educational provision among adults from different social classes/groups through effective marketing/promotion which is appropriately targeted. For example, Selby (1982) stressed that this is more likely to be successful if efforts and resources are focused on subgroups of adults using appropriate materials and channels to reach them.

Comment

As we have seen, the study of barriers to participation in adult education and training overlaps with that of motivation and demographics in relation to participation. Taken together these fields of study merge to provide a more complete view of factors affecting participation and the processes involved. This variety of research appears to suggest that barriers to participation in adult education and training range from individual/psychological barriers to external/social barriers which impinge on adults and constrain their behaviour. While not usually explicit, much of the literature does imply a complex interaction between these barriers. Individual barriers can be formed or reinforced by external or societal influences. Alternatively, an individual adult's motivation may allow him or her to overcome daunting barriers that prevent others in similar circumstances from participating. However, it may be argued that such a person's motivation has

been shaped and affected by past experiences, including external events. In reality, there appears to be a cyclical relationship between external and internal barriers with one type affecting the other. Much of the work done on the latter point falls into motivational research which was reviewed in Section 2.

There is evidence in the literature that the attitudes and decisions of those who formulate educational policy (at national or institutional level) can also act as an external barrier. In creating policy and establishment practices or rules it is possible that certain groups may be placed at a disadvantage. In short, the attitudes of providers and policy makers can translate into situational barriers for some groups.

The processes which lead to the creation of barriers and the way they affect participation are complex. However, research on barriers, if it does not always shed light on how they operate, does identify the range of potential barriers for groups of adults. As in other areas of research on participation in adult education and training, more descriptive than explanatory information is produced. This is a similar pattern to that found in much of the literature on participation in adult education and training which we have reviewed.

In both the UK and US literature there were very few studies of barriers specific to vocational education. As mentioned already, this may be due to a realisation that many of the barriers which can affect participation in general education apply also to vocational education.

The idea that barriers may operate in a hierarchical way, with some barriers being so basic (eg severe social and educational disadvantage, many domestic commitments) that they prevent adults from even considering looking for educational opportunities, so that lesser barriers (eg availability of information on provision) never arise, has been suggested by Munn and MacDonald (1988).

It seems to us that research using a variety of approaches is needed if we are to understand barriers to participation. We not only need to know more about the kinds of barriers, but, crucially, how these barriers operate. This implies the need for quantitative studies of participation being supplemented by more detailed case-studies or life-histories of adults.

5

EMPLOYERS AND ADULT EDUCATION AND TRAINING: RECENT REPORTS AND RESEARCH

In reviewing the literature on adult education and training we found that the area which appears to have been least researched is that on employers' attitudes, policies and practices on adult education and training. As in previous areas, we had difficulty in locating research in this field as such literature is rarely identified in social and educational research bibliographical sources. This is largely because such literature does not usually appear in 'mainstream' educational journals. As there are no comprehensive bibliographical sources for this type of training literature, access to such information was difficult. We also believe that much policy-orientated research sponsored by government is not published and may therefore not appear in publicly accessible sources. This means that much more literature than that reviewed may exist but is very hard to find. As a result of this paucity of available literature, we have presented the literature we have found in more detail than in the previous sections. We have also arranged it thematically. These themes include government commissioned surveys on the state of UK training and comparisons with economic competitors, the funding of training, and public sector training provision.

The context of 1980s literature on employers and adult education and training is one of rapid economic change and government policy responses. Since the early 1980s, the government has developed and implemented policy on training and produced a number of reports on these matters. *Towards an Adult Training Strategy* (MSC 1983) was intended to stimulate debate about adult vocational education and training, an area which had received little public attention in comparison with youth training. In 1984, the government's white paper *Training for Jobs* endorsed both the MSC adult training proposals and the development of adult training in general. This paper placed the main responsibility for training on employers.

Reports commissioned by the MSC, sometimes in association with NEDO, such as *Competence and Competition* (1984), *A Challenge to Complacency* (1985) and *The Funding of Vocational Education and Training* (1987), in addition to providing information about aspects of vocational education and training, also add to our contextual understanding of this field.

MSC/NEDO (1984) Competence and Competition

Competence and Competition (1984) studied the approach to education and training of the UK's three major economic competitors, the USA, Japan and the Federal Republic of Germany (FRG). Each country was studied in its own right rather than in direct comparison with the others. The researchers felt that direct and specific comparisons and evaluations were impossible due to differing cultures and social systems. For the same reasons, any wholesale adoption of a country's education and training methods by another country would almost certainly produce

different results. The study found that, in these three countries, all parties involved with vocational education and training - government, employers and educational services (public and other) - saw a direct link between investment in education and training and economic competitive success. These parties in all three countries also felt obliged to undertake an active role in developing and improving their country's education and training in response to improved economic performance. While direct comparisons were limited, the study argued that, in broad terms, those concerned with education and training in the UK were less willing to accept these responsibilities than were their counterparts in the other countries studied. Employers in the US and the FRG were investing more in training adults as the numbers of young people fell in their societies. While the same labour market phenomenon is occurring in the UK, investment in the training of adults is not happening at the same rate as in its competitors. Adult participation in UK vocational education and training is low in comparison to these other countries.

On responsibility for education and training related to work, employers in all three countries expected their governments to have less direct responsibility for work-related education and training than exists in the UK. Employers' responsibilities were more readily accepted in the former three countries. The study reported that in times of recession, US, Japanese and FRG employers and other educational bodies increased their training expenditure while in the UK training expenditure remained constant.

The study made comprehensive recommendations for the UK. Included in these were some especially relevant to employers and industry. These were:

- industry must take more responsibility for funding additional academic facilities in engineering if the University Grants Committee (UGC) and local authority resources are insufficient,

- industry and government need to insist on a more broadly-based syllabus for engineering students and a better preparation for flexible employment. Specific training would need to follow in companies,

- industry can break the vicious circle of poor pay, low ability, poor promotion prospects, poor employment flexibility and poor professional image of some skill groups (for example engineers) through changes in its employment policies and practices,

- the UK could not reasonably aspire to the rates of adult participation in work-related education which are found in Japan and the US. The report states that UK rates were not known, but that the UK should not be satisfied with less than the FRG rate of 12%,

- new forums should be created within employers' organisations, trade unions and providers of education and training, with a responsibility for deciding on collecting and using information about education and training performance. This need is particularly critical for employers,

- *either* each company must develop the capacity to negotiate with public authorities for what it wants *or* the CBI, perhaps together with other employer organisations at national level, needs to assess priorities and to back the assessment with resources and expertise to translate these into reality. A network of this kind could be expanded to include other education and training activities,

- the development of machinery necessary for employers to exercise joint education and training responsibilities demands investment of money and expertise. It can deliver most effectively if it is linked to medium- and long-term requirements of the labour market rather than with acute short-term shortages,

- employers should take the lead in proposing training outcomes and standards which will:

  (i) assure employability for young people, and for adults who have lost their footing in the labour market;

  (ii) raise productivity and occupational mobility. Employers should also take the lead in assessing and accrediting the achievement of trainees. In addition, they must provide work experience and training designed to achieve performance objectives, which implies close links with the education service, especially at local level.

It is interesting to note that while the study stated that UK adults participated less in vocational education and training in comparison to the other countries studied, in its recommendations it stated that there were no figures to support this.

MSC/NEDO (1985) A Challenge to Complacency

This report, undertaken by Coopers and Lybrand for the MSC, took the argument presented in *Competence and Competition* (MSC/NEDO 1984) a stage further. The argument was that those involved in UK vocational education and training, especially employers, largely failed to become proactively involved or to invest in training developments which were necessary for international competition. *A Challenge to Complacency* (MSC/NEDO, 1985) explored how employers might be encouraged to 'recognise their responsibilities collectively and individually, and ensure that their ability to compete is not further eroded'.

The study had four strands. The first, and major component, was a series of interviews with chief executives, personnel directors and other senior executives in about 60 companies. The companies ranged in size from those with 12 employees to some of the largest conglomerates in the UK. The remaining strands of the research consisted of:

- an examination of the various forms of available provision including ITBs and their non-statutory successors, colleges of further education and the MSC itself;

- an examination of the financial and tax aspects of training and possible future developments;

- an examination of arrangements and attitudes on training in the USA, France and FRG.

The report stressed that there was no simple explanation of training behaviour in the UK. Generalisations were often inappropriate as the factors which affected some companies did not affect others. Nevertheless, it attempted to outline some general tendencies 'despite the myriad of exceptions'.

The report concluded that encouraging employers to adopt a more positive attitude to training, and increasing their training expenditure, would be an 'uphill task'. Few employers thought that training was sufficiently central to their business for it to be a major component in their corporate plans. The great majority of employers did not see training as an issue of major importance. Most companies did agree that the UK did under-train compared with its main competitors. However, the majority saw the amount of training they themselves provided as being about right. The report suggested that this reflected complacency rather than confidence.

The study found widespread ignorance among top management of how their company's performance in training compared with that of their competitors, in the UK as well as overseas. A high proportion of senior executives had only a limited knowledge of the resources available for training in their own company.

The report identified indicators of the generally low level of importance attached to training as including:

- decisions on training delegated to line managers who often had 'short-term horizons when considering returns on investments';

- training was rarely seen as an investment but rather as an overhead, which would be cut when profits dropped, or as something forced on the company as a reaction to other developments;

- a widespread lack of analysis of training needs or evaluation of training;

- the relatively low status of training managers.

The report stated that, except in some service sectors, training was not seen as an important contributor to competitiveness. Few companies saw training as contributing towards profitability. Rather, most companies saw the relationship as being the other way around - higher profits led to increased training expenditure.

This reluctance to train, employers claimed, was reinforced by other factors. These factors were usually given as uncertainties about:

- the future performance of their companies;
- markets;
- the wider economic climate;
- technological developments.

The possible 'poaching' of newly trained staff by other companies, and job demarcation problems were also given as factors inhibiting training. The mixed responsiveness of providers of training (especially, in the public sector) to the needs of companies was also identified as a factor affecting training activity. Very few employers said that high trainee wages were an inhibitor to training. However, these factors given by employers as inhibitors to training were not felt by them to be real problems. Apart from uncertainty about economic performance and the market, the other factors rarely affected training decisions. Rather, the report found that these other factors were given by employers to reinforce and rationalise their already negative attitudes toward training. The report suggested that changes in these areas would not be likely to change the training activities of employers.

Another factor affecting training activity in the UK was identified as being the lack of external pressure on companies to invest in training. There was only limited pressure in the form of comparisons with competitors (UK and abroad), individual employees or unions, external commentators and government. Only with the YTS, had the government placed much pressure on employers to train. Indeed, the report stated that the Adult Training Strategy was 'invisible' to employers, with very few companies mentioning it. The researchers admitted that this might have been due to the campaign being at an early stage when the interviews were conducted. Those employers who did mention the Adult Training Strategy criticised it for its lack of focus and saw it as being too general to be useful.

The training situation found in the UK was in sharp contrast to that in some overseas competitors. In the FRG, there was a strong formalised tradition of training reinforced by legislation. There was also a constant monitoring of content of training, and recognised

qualifications given. Training courses were longer and more general in coverage. In France, there was legislation on company training expenditure and strong statutory rights for individuals regarding training. The USA was found to have a less formalised training system with the pressure for training coming from individuals wanting training or undertaking it on their own initiative. This was based on a strong ethic of self-advancement and responsibility to facilitate training. In Japan, a cultural training ethic also existed, with the emphasis on lifetime employment and, in the case of the large corporations, quality checks linked to training for their subcontractors. Added to this, the Japanese possessed a training system to provide individuals with appropriate and transferable qualifications.

The report stated that UK employers were aware that they did less training than these competitors and explained this away as being due to the different cultures and legislation in these countries. They did not feel the need for a positive response to them. The report advised that the UK's future international competitiveness was likely to be increasingly dependent on the productive skills of the national workforce, and that these would be determined by the efforts put into training.

On employers' attitudes and UK training activity, the report concluded that if the UK's performance on training was to be improved, this could only be achieved by a major change in employer attitudes to training, along with changes in the environment in which employers made their decisions. Given this conclusion on employer attitudes, changing their training practice was seen as a difficult task which could not be done quickly. The report advised that there was no simple answer which would change this situation. Initiatives implemented on a number of fronts at once, and over a period of time, aimed at changing employers' attitudes to training and their practice, were seen as the way forward. The 'themes' on which the initiatives should be based were seen as:

- exhorting and encouraging companies to invest in training;
- harnessing the interests of individuals as a means of bringing pressure to bear on employers;
- improving the operation of the training market to make it easier for companies to define, and obtain from external providers, the training they require.

MSC (1987) The Funding of Vocational Education and Training (VET)

Deloitte Haskins and Sells were commissioned by the MSC to produce a study on the funding of vocational education and training. This study formed the first part of a wider project on funding, the latter parts have yet to be reported. This initial part of the project mapped out the funding

arrangements for training in the UK. Included in this study was an examination of employers' funding of training.

The report stated that employers had:

> ...perhaps the most complex and multi-faceted role of all the main agents in the VET (Vocational Education and Training) system... They provide training to employees in a number of different formats: off-the-job; on-the-job, apprenticeships and in-house training; and may also act as private providers, offering provision to non-employees for which they may charge or which may be free (eg as part of a sales package).

The report added that employers were themselves major purchasers and users of VET provided elsewhere in the system, this often creating complex interactions with other parts of the VET network. Given this, it was not surprising that the analysis of funding of training used by employers could be extremely difficult and subsequent generalisations often impossible.

The report cited the *Adult Training in Britain* (MSC/IFF Ltd, 1985) survey as stating that training expenditure in the private sector averaged just under 2% of labour costs, with approximately one third of employees receiving some form of training. It went on to summarise the other financial findings of this survey. The report added that detailed information on other sectors of the economy was unavailable at that time. However, the report estimated that public sector training expenditure for 1984 consisted of:

- nationalised industries and other public corporations = 0.3 billion
- central government (excluding armed forces) = 0.4 billion
- local government = 0.5 billion.

The report also looked at the differing forms training took between different occupations, sectors and firms. On occupations, the research found that the bulk of operative-level training was done on-the-job, with support from day or block-release to local training providers, or the use of in-house training facilities. For these low skill jobs, it found that the training was specific to the job in question. As the skills content of the job increased, so did the proportion of off-the-job training, with greater use being made of knowledge-based as opposed to skills-based training for technicians. Formal management training was provided mainly through off-the-job courses. At these levels, the training was more broadly based and less job specific.

Employers' training costs per day were found to rise as the off-the-job training increased, since the trainee's productive contribution to the firm during that time would be lost. Also, costs per day would rise as the skills level and salary increased. Therefore, training expenditure per day was lowest at operative level, higher for technicians and highest for management.

The report found that there were differences between sectors in the costs which employers faced in providing training. Where practical instruction was given simultaneously with production

(eg in agriculture), then the net costs were lower than for sectors where the trainees left their job or task to undertake training and, consequently, production was lost.

Particular difficulties in the provision of training by small companies were identified. The smaller firm was likely to lack a specialised training department. Also, smaller numbers of trainees meant that the cost of in-house provision per unit was increased. Given these two problems, more outside provision was sought. An implication of this was that smaller firms were more dependent on knowing about existing training provision. A further problem was that key personnel in small firms were less likely to be released for training due to the lack of available cover. Smaller firms were more likely to use public rather than private sector VET. (Perhaps this is linked to knowledge of provision and costs).

Most employers funded the costs of training themselves. Employers attempted to offset the cost of training from sales or from training grants and other forms of support from government agencies. By implication, and according to the MSC reports reviewed above, when these were not plentiful, training may be reduced.

MSC reports and government papers on training provide an indicator of the economic and political climate in which developments and studies in adult education and training take place. We now turn to studies done on employers and adult education and training.

MSC/IFF Ltd (1985) Adult Training in Britain

This report, again commissioned by the MSC, concerned the findings of the first phase of a project on employers and training in the UK. This part of the research looked at the training attitudes and activities of 500 private sector UK employers, throughout Britain, employing over 25 people in all types of private sector business. The sample represented approximately 100,000 establishments that made up the private sector. The study covered the quality, nature and cost of adult training; management attitudes to training; and the relationship, if any, between adult training and business performance. The senior managers responsible for training were interviewed by telephone. Over three-quarters of the managers approached agreed to be interviewed, less than 10% refused and the remainder were unavailable at the time of the survey.

Employers were asked about the importance of training. Well over half replied that training was desirable and necessary. However, employers largely reported that they had not been encouraged by government and other bodies to train adults. Aware that these responses might be socially acceptable answers rather than a reflection of actual training practice, the researchers asked further questions about whether views were incorporated into training policy. Some 85% of employers indicated that training was a major responsibility of relevant senior staff and implied that training had a high status in their establishment. When asked whether training was discussed at meetings between management and unions, 72% of employers said that it was (negative replies included those from employers who had no union recognition). On whether training was a formal part of the establishment's business plan and whether there was money allocated for training in the

budget, 49% of employers replied 'yes' to both. More than half the employers in the sample stated that training was a regular item on the board agenda, that it was discussed at individual pay reviews and that there was a formal written training policy. However, the MSC/IFF (1985) report noted that two employers out of three stated that training was not mentioned in the company's annual report or used as a selling point to their customers.

These findings appear to reveal that attitudes to training were positive and that training had a relatively high profile within these establishments. It is interesting that 49% of employers actually allocated money in their budgets to training and included it as part of their business plan. This implies that the remainder might have seen training as a short-term and reactive concern rather than a strategic, long- term concern and, therefore, did not build training into their business plan.

When asked how they would adapt to the need for new skills, employers tended to state that they would retrain existing staff (84% responded to this category) rather than recruit skilled staff (12% responded to this category). In contrast to these generally positive attitudes towards training, the survey found that *only a minority of British private sector establishments were retraining for new skills.* Such retraining is widely acknowledged to be a major factor in being competitive in the world economy. Where such retraining was taking place, it tended to be in the manufacturing sector rather than in the service industries. Retraining was also found to be low in those establishments where output or profits were falling. This appears surprising in that one would imagine that such establishments would feel the need to use training to develop new skills as one way to match competition. However, it seems that when companies become financially constrained, they are unwilling or unable to implement such training programmes (Clendon and Yorke, 1987).

On the extent of training, the findings were that three-quarters of establishments had carried out some training of adults. In addition, one-third of employees had received some training in the three months prior to the survey. The researchers pointed out that, while this may appear acceptable, there were no figures available for comparisons with other countries. They also noted that their definition of training was much wider than that normally used by educationalists or the training industry; it included all forms of on-the-job training. (Our review, however, found that there was no common definition used by educationalists or the training industry). The researchers believed that an effect of this was that their findings on the length of training could be misread. Although employees who trained in the last 12 months received an average of 15.4 training days, only 5.5 of these were off-the- job. For the workforce in general, off-the-job training occupied, on average, 1.9 days per year or 14 hours. This, the report stated, stood in stark contrast to the FRG where 30-40 off-the-job training hours was the norm. Employers with 100 or less employees were found to be less likely to do training than larger establishments (72% of small employers compared to 99% of larger employers). A higher proportion of training in smaller rather than larger establishments was done on-the-job.

Another indicator of the extent to which employers value training is the expenditure they allocate to it. The survey stated that this was very difficult to measure. Broad definitions of training were used in an attempt to get a measure of gross training expenditure. Private sector establishments were found to be spending, on average, £20,000 per establishment. These average expenditure levels were surprisingly consistent both across establishments of different sizes (over 100 employees), and between service and manufacturing industries. However, different types of businesses within the service and manufacturing industries did vary in their training activity. 'Fabrication firms', in the manufacturing sector, and 'business' firms, in the service sector, did more training than other types of businesses in their respective sectors.

The survey also asked employers to estimate percentage changes in training activity for the past five years. They found a weighted average net increase in training of 11%. However, there were much higher individual increases for some large establishments (500 or more employees). Establishments which registered training increases cited as their main reasons for increased training activity:

(a) deliberate training policies;
(b) a new awareness and emphasis on training;
(c) the introduction of new technology;
(d) increases in the number of employees.

Establishments with lower percentage increases in training, or with actual decreases, were identified as usually being small establishments, process industries and consumer services. Consumer services, however, were reported as always having a high level of training, but their scope for large increases was limited. With the exception of consumer services, these establishments gave their reasons for their lower percentage increases, or indeed decreases, in training as:

(a) less labour turnover;
(b) recession/falling production;
(c) decreased number of employees;
(d) more skilled workers available.

These reasons for increased and decreased training activity illustrate the major factors which appeared to influence employers' attitudes to training and their subsequent decisions on training activity.

High business performance was strongly associated with a high level of adult training. The researchers cautioned that this was not evidence of a causal relationship. Indeed, they suggested that the relationship could operate in either direction - high business performance could necessitate

and/or facilitate more training, or more training could lead to higher business performance. It would seem likely that the relationship this study identified operates in a cyclical way, with high business performance and more quality training reinforcing one another and, conversely, a fall in one affecting the other.

Clendon and Yorke (1987) Adult Training: The Employer's Viewpoint

Clendon and Yorke surveyed 66 companies in the north-west of England. The aim of the research was primarily to help a public sector educational consortium (CONTACT), comprising the universities of Manchester and Salford, UMIST and Manchester Polytechnic, to develop its initial marketing strategy. Their information was also intended to be generally useful for the development of the Professional, Industrial, and Commercial Updating scheme (PICKUP). Of the 66 companies, 35 were in manufacturing (including engineering, food and drink, metal manufacture, clothing and textile, and printing and publishing) and 31 were service industries (including construction, distribution, insurance, banking, and advertising). Across the 61 companies they interviewed 39 directors, 14 managers and the remaining 24 interviews were with personnel and training staff.

The survey found that employers appeared not to be looking further ahead than five years when planning training. The norm was two to three years. The greatest changes employers faced, which had training implications, concerned business and management factors (eg competition, recession, need for more management skills), followed by those relating to computers and related technology. The largest economic change that they faced was increased competition. Changes in job content or structure, including skill shortages and turnover, were not seen as significant concerns.

Of the 66 organisations surveyed, 20 were uncertain how they would arrange training for new skills. However, 16 preferred to meet change reactively as the need arose, ten said they would tackle skill needs through recruitment (this applied especially to small manufacturing employers), six did not see change as affecting skills and only 11 said that they had an established training strategy which could deal with change. (Three responses could not be categorised.) The researchers' overall impression was that of a lack of planning for anything other than the immediate short-term. When training was done, rather than recruitment, retraining allied to workforce attrition through natural wastage and redundancy was preferred by most employers.

In the same study, when employers were asked how training was provided, the most frequent methods of learning technical skills were reported as:

- informal, on-the-job;
- in-house courses and training programmes;
- training by equipment manufacturers/suppliers;
- training by colleges, polytechnics and universities;

- external courses provided by commercial training organisations;
- self-study courses in the employees' own time.

The most frequent methods of learning managerial skills reported by employers were:

- in-house courses and training programmes;
- external courses provided by commercial training organisations;
- training by colleges, polytechnics and universities;
- planned training and development on-the-job;
- training by industry-based bodies.

Clendon and Yorke (1987) did not specify whether these lists were arranged in a descending scale of frequency. If they were, it is interesting to note that managerial staff appeared to be more likely to receive external courses from commercial providers and less likely to receive informal, low-key training than those doing technical skills training.

Larger employers in particular were found to fix specific training budgets. However, these tended to be kept low and this, in turn, could act as a further constraint on external training. The researchers noted that, given competitive pressures and the need to cut costs, it was often the training budget which suffered most. However, the researchers also found that, generally, financial considerations alone were not the most important factors in determining whether external training took place. When deciding whether to provide training, cost appeared to be set against the employer's opinion of the benefits of that particular training.

In this study, virtually none of the employers thought that the government should be responsible for training. Initially, this might appear to contrast with the findings of the MSC-sponsored study *Competence and Competition* (1984). However, the researchers implied that this referred to full financial support for training rather than to the direction of training in the UK. Nearly all employers did not know how financial constraints on training could be overcome. However, 14 out of the 66 employers interviewed said that grants would be useful.

Personnel levels and associated problems were also shown to affect whether some forms of training took place. Tight overall staffing levels were the commonest reason for difficulty in releasing staff for training. The special responsibilities of some staff also affected their opportunities to receive training. Such personnel considerations featured strongly in employers' decisions on training.

From the findings of this study and the MSC/IFF Ltd (1985) survey, it would seem that the decision to train and the forms used were shaped by a range of 'situational' variables (eg current business performance, competition from other companies, personnel availability, training costs etc) as well as by the employer's own attitude towards training.

CEDAT (1986) Small and Medium Sized Firms, New Technology and Training

Dorsman and Griffith (1986) at the Centre for Educational Development and Training (CEDAT) undertook a survey of 'small and medium sized enterprises' (SMEs) in the North-West region of the UK with the aim of studying the introduction of new technology into these establishments and the implications this had for training. This research formed the first phase of a three year research project 'Training of Trainers', sponsored by the EEC, MSC and Manchester Polytechnic.

They interviewed senior personnel in 65 SMEs which covered five economic sectors: plastics processing; chemical manufacture; manufacturing engineering; road transport/ haulage and distribution; and hotel and catering. In addition, a structured postal questionnaire was sent to 331 SMEs. Overall, 79% of the firms responding were from the manufacturing sector and 19% were from the service sector (2% could not be classified).

Their findings were:

- medium sized firms (between 200 and 500 employees) were more likely to possess new technology than small firms (up to 200 employees) and were likely to have possessed it longer;

- most medium sized firms had specialised data processing/computing departments to manage new technology: small firms were far less likely to have this facility;

- making a company more competitive and cost-effective was seen as a major reason for investing in new technology;

- the main barrier to investment in new technology was said to be cost. Training employees in the use of that technology was seen as an added cost, rather than an investment;

- however, more than 80% of SMEs intended to introduce, or add to, new technology in their companies in the following two years;

- the majority of SMEs were not able to state that there was a single individual in their organisation with responsibility for training;

- assessment of training needs and preparatory training prior to the introduction of new technology was not common practice;

- the majority of SMEs had chosen to retrain existing employees to use new technology, in preference to recruiting new staff with relevant expertise;

- suppliers, manufacturers of new technology and/or their agents, were found to be primary sources of information and training on new technology, regardless of the particular application being used;

- less than one in ten SMEs made use of industrial training boards, industrial training associations, further and higher education or private agencies as providers of advice and/or training in new technology;

- most SMEs trained employees to use new technology in their own premises. The majority of training occurred on-the-job. However, the larger the firm the more likely it was to use a combination of on- and off-job, and on- and off-site training;

- very little use was made of new training technologies such as computer based training, interactive video or training methods like open and distance learning;

- problems were encountered by SMEs introducing new technology, ranging from poor after-sales service and support, to employee resistance to technological change. Nevertheless, most SMEs felt that their investment in new technology had been worthwhile. (These problems can be seen to have indirect implications for the training needs of these SMEs).

Among these findings we see similarities to other research findings concerning employers and training, especially those of small and medium sized companies. For example, employers' perceptions of training as an added cost rather than an investment; the absence of specific training personnel suggesting that training was often reactive with no prior planning of training needs occuring; and the finding that the use of off-site, off-the-job training increased with size of employer. This study is interesting in that it revealed the networks of training information and provision used by SMEs. Here we see that those bodies and providers used by larger establishments, such as public education sector, private providers and training boards, and associations, were not consulted by SMEs. This prompts the question 'Why does this different network exist?' Perhaps public and private providers and training associations are not doing enough to reach SMEs.

Industrial Relations Services (1988) Industrial Relations Review and Report

Industrial Relations Services (1988) drew attention to the need for employers to reassess their training strategies. They stressed that employers could no longer rely on a steady stream of young people to fill vacancies. Falling birth rates and the increasing numbers of 16-19 year olds in further or higher education meant that employers needed to rethink their recruitment and training

strategies. This change was noted by the DES and the Training Agency (formerly MSC) and in 1988 they began to introduce measures intended to make employers aware of this change. The Training Agency suggested to employers that there should be more recruitment of adults, especially those who were long-term unemployed. Industrial Relations Services (1988) suggested that this change in the structure of the labour market should make it easier for women who have had a career break, for childcare, to return to full-time employment.

The Scottish Council (Development and Industry) (1988) Tomorrow's Jobs in Scotland

The Scottish Council (Development and Industry) undertook a study of the future composition and structure of the labour force in Scotland. The study was conducted between late 1987 and spring 1988. The study was based on a Delphic poll (a form of interactive opinion poll) administered to a panel of representatives of commerce, industry, education and the trade unions. Among the conclusions were the need for major adjustments in employers' recruitment and training practices, the need for government and training providers to ensure enough and appropriate training was available and the need for government to review its promotion of training.

The Council forecast a growth of about 100,000 in Scottish employment between 1991 and 2001, but male employment was expected to drop. However, female, part-time and self-employment were projected to rise dramatically. The main growth areas in employment, particularly for women, were seen as non-manual especially science, engineering, technology, security/protective services and the professions. Around 50% of Scottish males, compared to 41% at the beginning of the 1980s, would be in non-manual work. Female and youth unemployment were seen as decreasing to 10.5% by 2001 (compared with 11.6% at present), partly because of the projected increase in part-time jobs. The study also projected serious skill shortages in the managerial and technical sectors.

The Council's study (1988) concluded that the demand for training and retraining would grow until radical change was needed, change which the Council believed could not be met by 'unfettered market forces'. Rather, some form of 'spirited intervention' by government was necessary, with the government and its agencies ensuring that the capacity to deliver more education and training was available when needed. The study cast doubt on the government's present 'exhortation-based strategy' for promoting training and stated that this should be reviewed. The Council believed that offering tax incentives to employers and individuals was more likely to increase their willingness to train. The Council argued that individuals must adopt the idea of acquiring new skills throughout their working lives and accept that they may have to move from one job to another. The study also argued that the providers of education and training would have to become 'more orientated towards the changing needs of their client groups'.

Fonda and Hayes (1986) Is More Training Really Necessary?

Fonda and Hayes (1986) reflected upon their experiences of advising and working with employers. They stated that many employers were 'bombarded' with surveys, reports and statements from the government and other bodies informing them that they needed more and better training. They argued that such literature did not often inform employers about when training should be undertaken, what types of training were applicable to certain needs and, often, how to acquire this training. The weakness of such literature, they argued, was that it dealt in generalities and did not demonstrate to individual employers how their own organisation would be more effective and successful if they did more training. The authors suggested that training was not always necessary. Rather, employers should first examine their current workforce properties in relation to the industrial or business and social environment to see if the skills needed could be met by internal reorganisation rather than training. If new skills were still needed, they advised that various models of human resource development could help employers identify the training applicable to meeting those needs.

Bryant and Titmus (1981) Paid Educational Leave

Bryant and Titmus undertook a study of Paid Educational Leave (PEL) (1981) in Scotland, commissioned by the MSC and the SED. PEL, they stated, was the principal means of securing continuing education for most working men and women. They stated that in the UK:

> PEL rights in law are limited to the requirement that employers provide training release for health and safety representatives and trade union officials when requested to do so by unions. Most PEL is discretionary and has developed in an ad hoc fashion; in practice, and whether knowingly or not, it is also discriminatory.

Their study included an examination of employers' attitudes. They found employers' interpretation of educational leave tended to be narrow and confined to specific vocational aspects of work or recognisable trade union qualifications. This was reflected in the dominance of vocational or role-specific PEL.

They found little evidence that employers had a positive view of PEL as an end in itself. Organisational constraints on PEL included the primacy of meeting production/service requirements and the demands on employees time and the availability of staff. PEL was more likely to be granted to shop floor workers than to management and other professionals. The latter were more likely to have access to more liberal, less restrained training. Female and unskilled male workers were found to be less likely to take up PEL. This was compounded by the hidden costs of PEL, such as the family commitments of workers which were more likely to affect women.

PEL was found to be 'vetted' by employers prior to formal notification to the workforce and extensive publicity of PEL was discouraged. Most employers stated that they were satisfied with the content of existing PEL. PEL, when given, was usually at the convenience of employers. Some employers complained that providers could be more flexible in their timing of courses. Employer evaluation, where it existed, was found to be casual.

On the whole, large employers appeared to accept PEL costs related to training as justifiable expenditure. However, when faced with rising costs or static or declining revenue, both private and public employers indicated that PEL would be subject to tighter conditions with respect to length, venue and content. This appears to fit in with the literature reviewed earlier, on the factors affecting forms of education and training available in employment.

Employers and public sector training provision

A substantial amount of the sparse literature we did find on employers and adult education and training appears to have been written by public sector educational establishments. This literature is primarily concerned with researching employers' attitudes to such establishments and identifying the types of training courses which employers would want from them. We now turn to this literature.

Newman (1978) surveyed employers in the East Midlands to discover their attitudes (a) towards using Open University (OU) courses and (b) towards recruiting OU graduates. He found that employers were generally willing to support employees undertaking OU courses.

When the 52 respondents were asked if they were prepared to support students in various ways, they replied as follows:

	Yes	No	No policy
Contribute towards tuition fees	32	11	9
Pay for cost of set books	20	23	9
Allow paid leave for summer schools	30	12	10
Contribute to summer school fees	25	17	10

The majority saw an OU degree as equivalent to other degree courses. Only seven employers thought there were particular advantages in employing an OU graduate, and employers were unaware of OU activities or the OU courses undertaken by their own employees.

Newman (1978) stressed that this survey was a pilot study and that there were regional differences in the distribution of open and distance learners when comparing the East Midlands with the South-East of England. The latter was said to have more distance learners. One must also remember that this survey was undertaken 11 years ago and employers' attitudes and regional demographics could well have altered since then.

Bailey (1986) interviewed employers who had collaborated with, or used, higher and/or further educational establishments at one time. He found that while some employers did consider higher and further education when planning training programmes, this was not typical of most. Bailey stated that employers saw colleges as inflexible and not interested in change. Colleges were reported as feeling that employers did not understand the problems and constraints higher and further education institutions faced. It was found that effective collaboration between employers and public sector training providers relied on:

(a) top management perceiving training as important and directly related to operational performance;

(b) a well defined and understood training strategy with personnel committed to it;

(c) further and higher education staff being respected for their professional competence by a company's senior management and training staff;

(d) line managers, trainers and further and higher education staff working jointly on producing tailor-made materials to meet specific training needs;

(e) line managers defining specific objectives for the training, monitoring progress during the project and measuring the results against the objectives at the end.

Bailey (1986) noted that employers were increasingly demanding tailor-made training materials and programmes to meet their specific needs. Off-the-shelf courses held on college premises were less likely to meet employers' needs. He also found that employers were predominantly using further and higher education in two areas. These were, firstly, the development of management and supervisory skills and secondly, technical updating, especially for engineers. The 'management of change' and meeting the demands of a changing world set the context for such provision. Other areas in which employers used further and higher education were safety, customer services and languages.

The study identified two main learner types using public sector provision: manager/ supervisors and engineers. This reflected the main types of training the employers used within further and higher education sector provision. Notable 'absentees' from this type of training were office staff and sales personnel. Their training tended to be in-house or through private sector provision.

When asked why they had used further and higher provision, employers stated that:

- it offered better value in comparison to other provision they had considered;
- they already had strong links with further and higher education;
- this sector had a reputation for expertise in the particular training required.

The first and last reasons were influenced by the marketing of further and higher education establishments. However, the most important influence on the decision to use further and higher education was face to face discussion with college staff.

Of the 127 employers interviewed, 50 stated that they had at some time experienced problems when co-operating with further and higher education. These problems included colleges being too academic, too bureaucratic, the training was often too demanding and equipment was lacking. Employers also mentioned that learners' willingness to participate should not be taken for granted. Bailey (1986) stressed that this heightened the importance of employers and further and higher education staff developing a rapport and an understanding about just what was needed in the specific training programme. The need for colleges to be flexible was also seen as important.

Clendon and Yorke (1987), in the survey mentioned earlier, asked employers how universities and polytechnics might help overcome manning problems by more flexible training methods. Employers made three main types of suggesions and these were not mutually exclusive. As we shall see, half the sample suggested more than one kind of approach. Of the 66 employers questioned:

(a) 37 suggested different patterns by which training could be provided in work time. Most favoured short, concentrated courses of between half a day and one week;

(b) 34 suggested training done in employees' own time, usually in the evenings but also at weekends. This was popular with many employers as it generally raised no manning problems. Of these employers, seven favoured courses done partly in work time and running into early evening - so-called twilight courses, held between 4 and 7 pm;

(c) 27 mentioned open learning methods, although few gave evidence of direct experience or detailed knowledge of such provision. They saw the main advantages as flexible and good, consistent quality training. Some implied that these courses would be done in employees' own time, would need less back-up or support and would indicate greater personal motivation on the part of employees.

Clendon and Yorke (1987) believed that there was some opposition from employers to training done in the employees' own time. Some employers mentioned that industrial relations problems might result from such arrangements. Employers mainly wanted training to be done at a convenient place, which usually meant the place of work.

In the same survey, it was found that only one in ten employers considered that qualifications were important in training. They implied that training should provide practical rather than theoretical knowledge and skills. Employers also associated qualifications with initial education rather than continuing education and training. Qualifications were seen by employers as important mainly in selection and recruiting. It is interesting to note that many employers also saw qualifications as a threat in that employees would be better placed to move on to other jobs.

The research drew the following conclusions:

(a) polytechnics were seen as providing a back-up role for training opportunities when in-house and other external sources were either inappropriate or unavailable;

(b) employers were unaware of what polytechnics and universities had to offer;

(c) employers had a respect for the academic/theoretical expertise of polytechnics and universities but had doubts about the practical, technical and business applications of the training they offered;

(d) polytechnics and universities were highly valued, by employers, as sources of new ideas and viewpoints on problems and as places to make useful personal contacts;

(e) polytechnic and university training was seen as likely to be economical;

(f) polytechnics and universities had a forbidding image, being seen as closed to the general public.

Employers suggested that the public sector providers could make their courses more relevant to their needs by improving contacts with industry, designing their training courses in association with industry and ensuring that teaching staff for training courses had recent industrial experience. Seconding academics to industry was also suggested. Employers advised polytechnics and universities to avoid areas of training already provided by other trainers. On teaching methods, most employers felt that academics needed to improve their skills as teachers.

The overwhelming attitude of the employers was that the initiative and need for action lay with the public sector providers. Employers felt they had a responsive role. Clendon and Yorke (1987) suggested that this implied that employers were passive towards training and did not see it as fundamental in meeting operational needs and objectives. Employers, they added, 'are uncertain as to what training might benefit them; they are waiting for it to be sold to them'. Perhaps Clendon and Yorke's (1987) work suggests a need for employers to be educated in relation to when it is necessary to train, what training is appropriate and how to obtain that training.

At a BACIE conference Eric Tindall (1982), the then Director General of the Road Transport Industry Training Board, gave his perceptions of the way employers saw training and public provision. He mentioned that it was in the nature of British industry that it had a horror of training for training's sake. He added that for over 30 years he had observed an insufficient use of the further education service by industry. The main reason for this, he felt, was, 'much of British industry is still managed by those who are afraid of the impact of scientific management thought on their entrenched positions'. Tindall added that, 'one of the facts of life we have learned in the last twenty years in training boards is that the minority of employers who support the concept of education and training in this country are not typical'. He mentioned that, in 1982, only one in five employers did training. However, he felt that there were some grounds for employers' suspicion of further education. He saw British employers as essentially practical people with an aversion for anything academic. Academic institutions themselves, in the forms of communication they used, had not helped to allay these fears. Academics communicated and worked using different levels and forms of concepts from employers and business. They had not, he felt, learned to speak to employers in their 'language'.

Economic and social change, resulting in a growth in the service industries, was given by Tindall as a reason for the mismatch between many employers' needs and the rather traditional technical skills and expertise that made up the greater part of the provision available from further education establishments. He believed that the lack of capital investment in further education, which would be needed to meet this change, was largely responsible for the types of provision usually available from this sector. Given the findings of much of the research cited in this section, it would appear their employers' attitudes have not changed radically since Tindall made these points.

Dennis Cosgrove (1984) surveyed the continuing education needs of employers and professional bodies in the Strathclyde region. The main aim of the survey was to assess the potential of further and higher education services in providing courses for these groups.

For the employer section of his project, he used a 5% random sample of all employer establishments in the region (excluding religious bodies and public houses), which gave a sample

size of 2,300. He obtained a response rate of 45% (N = 754) which included all sizes of employers (ranging from five employees to over 5,000) and all types of industry, commerce and the service sector of the economy. A self-completion questionnaire was used to gather the information. This may account for the rather low response rate.

On employers' educational needs, he found that:

(a) employers in all industrial classifications considered their greatest need to be in business or administration and management. This educational need appeared to relate to employees who were in middle and senior management positions but who had little or no formal business or management education. In addition, there was a demand for refresher and updating education;

(b) the need for education and training in computing and information technology applied throughout all the employer categories;

(c) the need for computer science, mechanical, electrical and electronic engineering appeared to be directly related to the development of new technology in these fields;

(d) the need for continuing education in biological sciences was applicable to the food and drink industry and could be related to new developments in biotechnology;

(e) the needs for art and social studies, cultural and recreational subjects were small and were largely related to the administrative, professional and the commercial sectors of the economy, a substantial part of which was local government;

(f) the statutory requirement on employers to provide education in trade union studies and health and safety courses was shown to be an educational need that was not being met. Employers did have a demand for such courses but there appeared to be a lack of such provision.

According to Cosgrove (1984), most employers did not consider social studies and cultural courses to be vocational or relevant to the needs of their organisations. Employers saw their educational needs in job-related or vocational terms. The self-development and educational needs of individual employees appeared to be given little attention by employers.

Cosgrove (1984) also asked employers to indicate the occupational groups of employees for whom the stated education and training needs were required. He found that educational needs were:

> largely for managerial, professional and technological staff (the higher social classes). The educational needs of the occupational groups, skilled, semi-skilled, and manual (lower social classes), relate almost exclusively to health and safety and trade union studies.

In general, it was found that employees from the 'higher social classes' were 2.5 times more likely to receive training than those from the 'lower social classes'.

Cosgrove (1984) found that employers preferred short non-residential courses, seminars and conferences. They were prepared to allow paid educational leave for employees to attend these forms of provision. Long-term courses were unpopular, presumably due to problems associated with manpower cover. Employers of all sizes and from all areas of industry and business saw one- to three-day refresher and updating courses as the best form of course to satisfy their educational and training needs.

This research also found that employers were willing to pay the full fee for employees' courses only when they were clearly vocationally orientated. When asked whether a government subsidy would increase their willingness to pay course fees, 95% of employers replied that they would be willing to pay for more educational leave, including non-vocational leave, if the government paid part of the fees or if fees were tax-deductable. There was a consensus amongst employers that government should be making a much greater contribution to running costs. These findings contrast with those of Clendon and Yorke (1987), cited earlier, which appeared to show employers expecting far less of government, perhaps reflecting a changing perspective on the role of government.

Cosgrove (1984) asked employers to specify the kinds of education and training provision they required which were not currently provided by further and higher education establishments. Only 25% responded to this question, which, he suggested, might imply that most employers were reasonably satisfied with existing provision or it might be that employers did not know what courses would suit their needs. The overall view of employers was that they would like courses directed to their own organisation or type of industrial practice. They did not favour general courses.

Cosgrove (1984) stressed that while employers could be seen to have education and training needs, they often did not know exactly what these needs were. He pointed out that there were education and training needs, such as management/business administration and computing, which could be seen to cut across size and industrial classification. These appeared to be related to change in industry and business and the need to train scientific staff for managerial positions.

Guidance on training needs

In the literature we have covered, it emerged that there was a general absence of any co-ordinated help and advice for employers about their training needs. However, a study by Nelson (1988) on guidance for adults in Scotland concerning training and vocational education, included employers' views on training guidance and advice available to them. Employers were asked whether the various kinds of available advice were useful. Nelson (1988) found that 71% felt that the information they received was useful. Employers in urban areas found the advice more useful than those in rural areas (75% compared with 64%). About three-fifths of employers felt that advice about the suitability of external training courses would be useful to them. However, there was less interest in the creation of an external agency to assess employees' training and education needs. When employers were asked to think of types of advice and information they would find useful, 41% said that any information would be welcome, 39% said that they received all the advice they needed and 20% didn't know. There was little interest in the provision of a central directory of available courses.

Nelson found that only 19% of Scottish employers knew about external courses. He compared his employer data with English and Welsh data. He found that more Scottish than English and Welsh employers ran courses within their own organisations (59% compared with 39%). Similarly, more Scottish employers were found to have organised help within their establishments (63% compared with 54%). The first place employers would go for advice and guidance on training was found to be an appropriate professional or trade association, with 42% of the employers using this method. Someone within their own organisation was the next most common source of guidance, with 43% of employers using this source. A local educational establishment was mentioned by 39% of the employers as a source of guidance. Fewer Scottish employers than those in England and Wales were found to mention a Jobcentre as a source of advice and guidance (17% compared with 25%).

In his study, Nelson also touched on employers' attitudes to training. The results were interesting. Some 48% of UK employers stated that they felt it was *their* responsibility to offer their employees training or education which was not directly related to their short-term job prospects within the company, but which might be helpful in developing their future potential. The overall Scottish percentage in this group was 18% higher than that for England and Wales. Of the remainder of the employers questioned, 20% felt it was equally the responsibility of employer and employee and 28% felt it was wholly or mainly the responsibility of the employee. Far more urban than rural employers felt it was their responsibility (60% compared with 27%).

Comment

Although there appears to be less accessible work done on UK employers than in other areas of adult education, there do appear to be some common findings arising from the surveys and particular studies undertaken since the late 1970s.

Employers' general attitudes on training appeared to be positive, seeing it as necessary and desirable. However, their actual training activity did not always correspond to these general attitudes, with training often being seen as secondary to other business concerns. We can see in the literature some common training needs employers had. These were:

(a) training courses which were specifically related to their industry or business. In particular, they wanted courses designed to cope with economic change (see d);

(b) short, intensive training courses which did not cause personnel cover problems;

(c) where possible, courses to be provided at the workplace;

(d) managerial/business courses for senior personnel and new technology courses for those personnel affected most by technological change;

(e) the public education sector needed to be more attentive to employers' needs and to provide relevant courses designed with (a), (b) and (c) in mind.

We can also see from the literature that factors other than the attitude of the employer affected whether training was provided and the form it took. Factors, such as establishment size and profits, available personnel and their existing skills, cost of training and available training provision, shaped, and impinged on, an employer's decision on whether to train and how to train. If the apparent benefits of a course outweighed the overall costs then they would train. The decision on the training they wanted was again likely to be subject to the process that affected the decision whether to train.

The employee's work status and position in the workplace hierarchy appeared to be an important factor in deciding which employees received training and the level of that training. Those lower in status were less likely to receive anything other than basic and specific skills training.

The MSC (IFF Ltd) survey (1985) found that private sector training in the UK fell behind national competitors, especially the Federal Republic of Germany, in terms of the quantity of training. *Competence and Competition* (1984) made similar claims, stressing that the USA, Japan and the FRG were far better suited, in terms of their training programmes and workforce qualifications, to adapt to world- wide economic change and competition.

The research done on training in the UK revealed that the training least done in the UK was in the area of learning broader, new skills , especially in scientific, technological and engineering areas which the government believes are necessary for Britain to compete effectively in international markets.

UK employers appeared not to have the same priorities and perceptions of their responsibilities regarding training as their foreign competitors. UK employers appeared to take a reactive rather than an proactive role in training developments, unlike their competing counterparts.

The literature did mention that UK employers lacked information and guidance at a local level on whether they needed to train and, if they did, what types were necessary and which provider was best suited to fulfil their needs. Generalised statements made in reports may be of little practical use to many employers. Developments in the area of training advice and information for employers, and a change in the attitudes of all parties concerned in training towards their responsibilities, would appear likely to be beneficial to the economic performance and competitiveness of the UK.

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